

Grantium 7 Front Office Online Grant Application User Guide for Individuals & Arts Organizations

Welcome to GATE

The AFA accepts applications for our funding opportunities through Grant Administration Tracking and Evaluation (GATE) online application system. This guide will walk you through the steps to access GATE, complete and update your user profile, find funding opportunities, start and submit your application, verify the status of your application using messages, and submitting your final report.

This user guide is intended to answer the basic questions around navigating **Front Office** and submitting your application and reporting. It is not intended to answer questions about program guidelines or content of your project or operating grant.

For more assistance, please contact the Arts Development Consultant responsible for your funding opportunity. Contact information is located in your Program Guidelines, available on the AFA website.

Before you start

First Time GATE username registration

First-time applicants will require a GATE username and password. Email GATE Registration to get your GATE login information at least five business days prior to the application deadline.

Please include your legal name, funding to which you are applying, and your email address. If you are registering on behalf of an organization, please also include the Legal Name of the organization as registered with Alberta Corporate Registry.

Your GATE user name and password will be sent to the email address provided.

Returning GATE users

If you are a returning user, you do not need to request a new username. Use your previous login information to access **Front Office**. Should you have trouble accessing your account, email GATE Registration for a password re-set.

Please note, if your account goes for 6 months without login, you will be required to request a password re-set.

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Useful Links

- AFA Website: <u>www.affta.ab.ca</u>
- AFA Program
 Guidelines:
 <u>www.affta.ab.ca/</u>
 funding/find-funding
- GATE Front Office: <u>https://gate.alberta.ca/gate/frontOffice.jsf</u>
- GATE Registration email: registrationAFA@gov.ab.ca
- Helpful Tips for your application: www.affta.ab.ca/ funding/help-andresources

Welcome to Front Office



Accessing GATE

Once you have received your username and password from GATE Registration you can access your applicant profile at https://gate.alberta.ca/gate/frontOffice.jsf. Click the Login button in the top menu bar. This will open the login screen where you can enter your username and password.





My Work

The **My Work** page is your home page in Front Office.

Funding Opportunities

The **Funding Opportunities** page is where you will find a list of all current funding opportunities accessible on Front Office.

Applicants

The **Applicants** page is where you can see your profile and update your information.

User and Contact

At the bottom of the tab you will find buttons for **User** and **Contact**. Click on User to log out of your account. Click on Contact for assistance.

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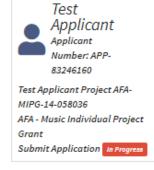
Navigating Front Office

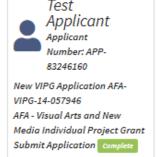
Your **My Work** page is your home page. Clicking on **My Work** or the home button will return you to the main screen.

The most important feature of your **My Work** page is the **Recent Submissions** bar. Here you will find all recent "**In Progress**" or "**Complete**" applications and/or "**Final Reports**". If it is your first time applying for funding this bar will be empty. Once you start the application process your application will appear here.

We recommend you ignore the **Recent Projects** bar while navigating your **My Work** page. It functions the same as **Recent Submissions**, but requires additional points and clicks.







Application in Progress

Once you have started your application you will see a tile for each project in the recent submissions bar. Should you log out of your account before submitting your application this tile will display an "In Progress" notification. To continue a previously started application click on the tile. This will return you to the program overview tab of your application where you can continue working.

Application Complete

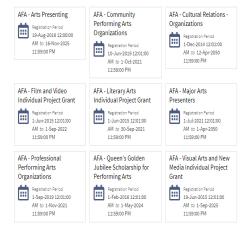
Once you have completed and submitted your application you will see that the "In Progress" notification has updated to "Complete." This means your application has been successfully submitted and is under review by Arts Development staff. Should you need to update contact information on your application you will be required to contact your program consultant.

Starting your Application

To start an application click on **Funding Opportunities** in your side navigation panel. This will display a table with all current funding opportunities for the Alberta Foundation for the Arts (AFA) and the Alberta Media Fund. Navigate the table to locate the grant you would like to apply for. Make sure you select the correct grant—all AFA funding opportunities will start with "**AFA**."

Click on the program's tile to open the grant or scholarship information page. You will be able to access the current guidelines for each funding opportunity and directly apply from this page. Click on "Apply Now."





Funding Opportunities Page

Select a Profile

Click on the applicant profile to use for your application. Most applicants will only have one profile. However, some users may have multiple organization profiles. Click on the correct profile for your grant type and click "Save & Next."



Select a Project

Once you have selected your profile, you will be directed to the "Select a Project" page. Here you will have the choice to continue with an existing project you previously started or enter a new project name in the "Applicant Project Name" text box. Click "Save & Next" to proceed.



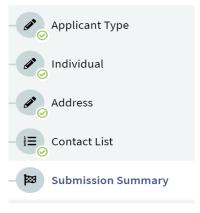
Applicant Profile

If this is your first time applying, you will need to fill out your profile. If you are a returning applicant, review and update your profile information if necessary.

First time applicants must complete each page of their profile. When you reach your "**Submission Summary**" page, it will summarize all tabs. If you missed an item on a previous tab, you will see an **X** beside the item. Click on the underlined item beside the **X**, complete the page, and save. Repeat for every **X** until you see a check mark √ beside every item on your "**Submission Summary**" and then click on "**Complete.**" You will then be directed through your application.

Returning applicants may need to update their information, including their mailing address. You must first go to the "*Submission Summary"* page of your profile and click on the "*Edit"* button. Navigate to the profile page you wish to update. Make your changes and "*Save"*.

IMPORTANT: Once you make and save your changes, you **must** return to your "**Submission Summary**" page and click on the "**Complete**" button to continue and proceed with your application.





Application Tips

IMPORTANT:

We recommend that you prepare all information and documents required for your application before starting. Keep these easily accessible while you are working through the forms.

Items you want to have on hand may include Project Description; Organization information; Current Board List; Project Budget, Expenses and Revenue; Marketing Plans; Banking Information; and any other applicable attachments.

Please see your program guidelines or contact the Arts Development Consultant for your funding opportunity should you require assistance preparing for your application.

Completing your Application

Once you have successfully updated your profile, you will be directed to the "**Program Overview Page."** This is where you will start your application. If required, you are able to open the program guidelines by clicking on the link provided.

IMPORTANT: Please note, your application will consist of multiple "pages" or "forms". These will vary depending on the program you are applying to.

Each application will require unique information to your grant or funding opportunity. Make sure to read all information on the page thoroughly, checking that all mandatory fields (marked by an *) are filled in. Once complete click "Save & Next" at the bottom of each page to proceed to the next tab.

Sample Application Pages

Project Grant Example: Program Overview Applicant Information Contact Information Applicant Contact Information General Information Project Description Principal Artists Individual Applicant Agreement Project Budget Project Expenses Project Revenue Attachments Submission Summary

Program Overview

Contact List

Applicant Contact
Information

Organization Information

Organization Applicant
Agreement

Current Board List

Community Derived
Revenue Calculation

Diligence Questionnaire

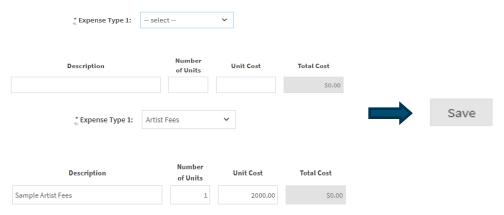
Attachments

Submission Summary

Project Grants—Project Budget Expenses

When submitting your expenses for project grants, choose the appropriate expense type from the drop down menu. (For operating grant programs, please refer to Page 6). Input the Description, Number of Units and Unit cost. You will also have the option to add any additional comments to each section. Once you have completed the table with all expenses scroll to the bottom of the page and click "Save." This will update all grey boxes, including your "Total Costs" column and your "Total Proposed Expenses."

IMPORTANT: Each "Description" MUST include a "Number of Units" and a "Unit Cost," otherwise you will not be able to submit your application.



Project Grant Revenues

You may be asked to report any Non-AFA revenue contributing to your project. This could be funds you are receiving through artists fees, personal contributions, grants from other funders, box office or sales revenue, donations, or other funding.

Fill in the table with the "Description", "Amount" and "Funding Status". You can include any additional notes in the comments box. Click "Save" to update the "Grant Amount Requested" box at the bottom of the page. Once complete click "Save & Next" to proceed.

IMPORTANT: If your project expenses exceed the maximum grant allowable according to your program guidelines, you will not be able to submit your application. Your project revenues must include all applicable non-AFA funding to reflect a balanced budget.

Non-AFA Revenue



Application Tips

IMPORTANT:

Project grants and operating grants have different expense formats to complete.

Most project grants require a project budget—including detailed expenses and revenues.

Operating grants
require you complete
a "Community
Derived Revenue
Calculation" or
"Expense
Calculation" to
determine your
eligible grant request.

Use your organization's most recent board-approved financial statements to complete this section. See Page 6 for more information.

IMPORTANT:

Data cannot be entered into greyed-out fields. These will auto-populate and update every time you click on "Save" at the bottom of each page.

Application Tips

IMPORTANT:

CADAC refers to
Canadian Arts
Database. Line items
and references for
CADAC **only** apply to
the following grants:

- Major ArtsPresenters
- Professional Performing Arts Organizations
- Public Art Galleries
- Provincial Arts
 Service
 Organizations

Applicants to the Community
Performing Arts
Organizations and
Community Support
Organizations funding
opportunities should
complete their grant
calculation forms
using their most
recent Boardapproved financial
statements.

Operating Grants—Eligible Grant Request Calculations

If you are filling out an application for an arts organization, the required information for grant calculations will vary based on the funding opportunity you are applying to.

You may be asked to provide statistical information, Community Derived Revenue (CDR), and other content based upon your organization's financial statements, events, artist fees, and other grants received.

For more information please refer to your program guidelines or contact the Arts Development Consultant for your funding opportunity.

IMPORTANT: All fields must be completed before you can proceed with your application submission. Grey boxes will auto-calculate when you click on "Save" at the bottom of the page.

* CADAC line references do not apply to CPAO applicants.				
	Year 1			
Fiscal Year End				
* Total Expenditure				
(Line 5600 from CADAC form)				
Total of:				
Artistic Expanses (Including Exhibition, Production, Technical, Programming and Services) Facility Operating Expenses Marketing and Communications Expenses Fundiating Expenses Administration Expenses				
* Total Revenue				
(Line 4700 from CADAC form)				
Total of:				
Earned Revenues Net Investment Income (trust, endowment and investment revenue) Private Sector Revenue (donations and sponsorships) Public Sector Revenue (Grants)				
* Total Federal Grants				
(Line 4440 from CADAC form)				
(Life 4440 from CADAC form)				
* Total Provincial Grants				
(Line 4500 from CADAC form)				
Note: casino revenue is not a provincial grant.				
* Total Municipal Grants				
(Line 4535 of CADAC)				
Total Public Sector Revenue	\$0.00			
(Line 4550 of CADAC form)	\$0.00			
Community Derived Revenue	\$0.00			
Community Derived Revenue	30.00			

Required Attachments

On the "Attachments" page, click on the underlined "Document Type" to upload the requested document. You must upload information for any lines listed "Yes" in order for the system to process your application.

Your project **may also require** additional attachments or support material in addition to those listed as required in **Front Office.** Refer to your program guidelines for which attachments are required for your project type.

IMPORTANT: Your project **may also require** digital media, video or sound files as part of your submission. However, **Front Office** cannot accept these file types at this time. Refer to your program guidelines for information on how to submit these materials. You will also see contact information at the top of "**Attachments**" page on how to email these files directly to your program consultant.

Once you have finished uploading all of your attachments, click "**Next**" **Page**" to proceed.

Document Description:	Detailed Project Description Attachment
* File Name:	Choose File No file chosen
Document Type:	02. Detailed project description
Maximum Size:	4 MB
Allowable Formats:	jpg, txt, xlsx, pdf, rtf, xml, doc, wpd, mpp, xls, doc
Instructions:	

Delete	Document Type	Required?	Download	Document Description	Date Attached
8	01. Artist resume	Yes	⊕,	Artist Resume	2021/07/22
	02. Detailed project description	Yes			No Attachment
	03. Dance selection 1 (see note above)	No			No Attachment
	04. Dance selection 2 (see note above)	No			No Attachment
	05. Commission contract	No			No Attachment
	06. Proof of acceptance and detailed description, schedule, and budget for the training program	No			No Attachment

Sample individual attachments

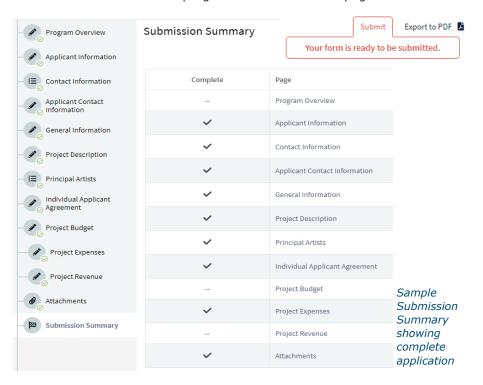
Delete	Document Type	Required?	Download	Document Description	Date Attached
8	01. Artist resume	Yes	⊕,	Artist Resume	2021/07/22
8	02. Copies of promotional material	Yes	⊕	Promotional Material	2021/07/22
8	03. Description of org history	Yes	⊕	Org history	2021/07/22
8	04. Detailed project Description per program guideline 4.5	Yes	⊕,	Project Description	2021/07/22
8	05. Marketing plan	Yes	⊕	Marketing Plan	2021/07/22
8	06. Most recent annual financial statement	Yes	⊕,	Financial Statement	2021/07/22
8	07. Most recent annual return from corporate registry	Yes	Φ,	Corporate Registry	2021/07/22
8	08. Sexual harassment policy	Yes	⊕,	Policy	2021/07/22
8	09. Void Cheque or Direct Deposit Form	No	⊕,	Void Cheque	2021/07/22

Sample arts organization attachments showing all files uploaded

Submitting your Application

The final step of your application is your "Submission Summary." This page summarizes all the previous pages you have completed. If all tabs and fields have been completed, you will be able to submit your application.

From the "Submission Summary" page, click on the "Submit" button, located in red text on the top right-hand corner of the page.



Attachment Tips

IMPORTANT:

Applications and Final Reports require multiple attachments.

If an attachment is listed as "Required," in Front Office it is a minimum system requirement to submit your application.

Your project type **may require additional** mandatory attachments or support material.

These attachments will vary according to the type of project you are proposing. For example, a marketing project requires a marketing plan.

Career/training projects require proof of acceptance and a program description.

Failure to upload any additional support material as outlined in your program guidelines may result in an incomplete application or final report and may be ineligible for consideration.

Submission Tips

IMPORTANT:

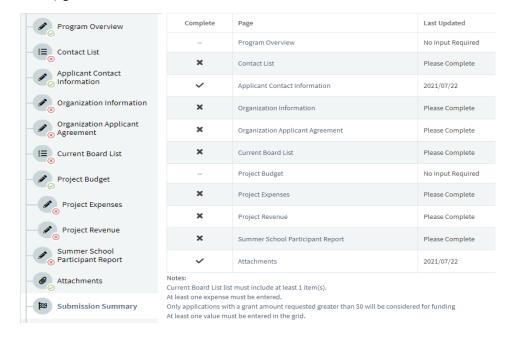
If your Submission
Summary shows
incomplete
information pay
attention to the Notes
at the bottom of the
table. This will help
identify the issue and
what information is
missing from your
tabs.

Click on the page description beside the **X** to go directly to the tab where mandatory information is incomplete.

Summary Errors

If, for some reason, you have missed an item on a previous page, you will see an \mathbf{X} beside the page. Click on the underlined page beside the \mathbf{X} , complete the page, and save. Go directly to the **SUBMISSION SUMMARY** page by clicking "**Submission Summary**" in the grey menu to the left. Repeat for every \mathbf{X} until you see a check mark \checkmark beside every page. When you have all check mark 's \checkmark , you can click "**Submit**" at the top of the page.

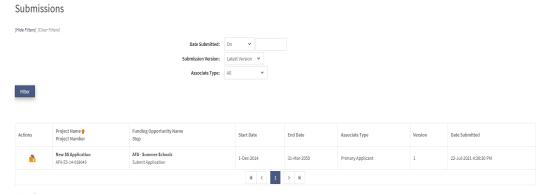
Before you submit: you can print out a paper copy of your submission if you wish. Just click on *Export to PDF* located in the upper right corner. Then, go back and click *Submit*.



Successful Submission Page

After submitting, the screen reverts to a Summary page with the message, "You have successfully completed your application." Click "Finished" at the lower right and you will land on Recent Submissions where you will see a new tile has appeared with your project title, number, and COMPLETE now added.

On your **MY WORK** page you will see that the tile for your application updates to show progress as "Complete." Your application is now in review.



Submissions Page



14-058045
AFA - Summer Schools
Submit Application Complete

Submission Bar updates to show complete

Accessing your Final & Interim Reports

If you have received funding, you are required to submit interim and/or final reports. Log into **Front Office** when you are ready to submit your report. In your **Recent Submissions** bar you will see tiles for any outstanding reporting. These will appear as "**Ready"** or "**In Progress"** until they have been completed and submitted.



Test Scenario 1.22 - Interim Report 2 AFA-PASO-14-057898 - Interim Report 2 AFA - Provincial Art Service Organization Payment/Report

Test Scenario 1.22 AFA-PASO-14-057898 AFA - Provincial Art Service Organization Submit Final Report Ready

Click on the appropriate tile to start or continue your report. Make sure the project number correlates to the final report project number you need to submit, and ensure every mandatory field is completed (marked by an *). Complete all pages until the "**Submission Summary"** page, clicking on "**Save and Next**" as you go through your report.

Submission Ready



Sample Individual Final Report Once your have reached the *Submission Summary*, verify that all information in the previous tabs is complete. If, for some reason, you have missed an item on a previous page, you will see an \mathbf{X} beside the page. Click on the underlined page beside the \mathbf{X} , complete the page, and save. Repeat for every \mathbf{X} until you see a check mark \checkmark beside every page. When you have all check mark `s \checkmark , you can click "Submit" at the top of the page.

Submit Export to PDF
Your form is ready to be submitted.

Submission Summary

Sample Submission Summary with Errors or Missing Information

You will not be able to "Submit" until these issues are resolved.

Complete	Page	Last Updated	Mandatory
	Reference Submissions	No Input Required	No
~	Report Details	2021/07/23	Yes
×	Statistical Report	Please Complete	Yes
	Statement of Eligible Expenses	No Input Required	No
~	Current Board List	2021/07/23	Yes
×	Attachments	Please Complete	Yes
	Submission Summary	No Input Required	No

Final Report Tips

IMPORTANT:

Your requirements for reporting vary depending on your project type. Final reports are required for all grants, but multi-year funding requires additional interim reporting.

It is recommended you have all of your reporting requirements ready, including budget actuals (where applicable), description of project results, confirmation of attendance (where applicable), copies of promotional materials, etc.

If you received a project grant that included **Art Production**, you must also submit a copy of the work produced. Upload the completed work into your attachments when possible (i.e. visual arts or literary arts) in PDF format. Forward media or audio files to your consultant as outlined in your program guidelines.

If it has been over 6 months since you last logged in, you may need to re-set your password.

Please email GATE Registration for a new password.

Message Tips

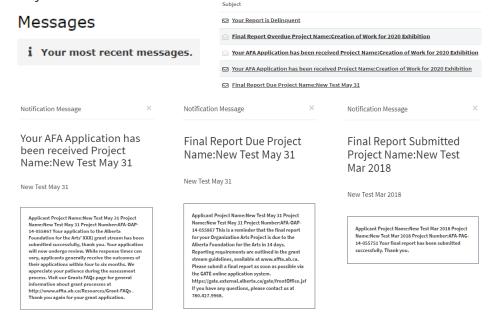
Your **Messages** bar will display a variety of notifications based on the funding opportunity you have applied to. This could be confirmation of successful application submission; status of your grant; final report notices; or delinquent report status.

IMPORTANT:

Please remember to also check your personal email for communication from the Arts Development Consultants throughout the application process. Not all communications will appear in the Messages bar in GATE.

Messages

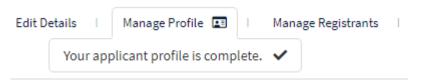
On the **My Work** page, you will see the bar for **Messages.** This is where you will find all recent communications regarding your application status. We recommend you log into **Front Office** and check this section frequently for any updates or notices that require your action. Click on the message subject line to view.



Updating User Profile

You may need to update your user profile after you have submitted an application. Update your profile directly in Front Office using the following steps.





When you log in to **Front Office** click on **Applicants** in your side navigation panel. This will open a page with your user profile. Click on the profile tile to open up your user profile information page. In the top right corner you will see a navigation bar which shows the status of your profile. To update select "*Manage Profile*" and then select the "*Submission Summary*" tab. At the bottom of the page click "**Edit**" to open forms for editing. Select which tab you would like to update and "*Save*" to complete. Once you are done return to the "*Submission Summary*" page and click "*Complete*" to close forms and go back to your user profile page.

IMPORTANT: This **does not** update your application. If you have submitted your application already please contact the Arts Development Consultant directly to ensure we have the appropriate contact information on file and so your application can be amended by our office.

Frequently Asked Questions

Does my Username or Password expire?

Your username does not expire, but your password does after six months. Email registrationafa@gov.ab.ca to have a password reset completed.

What browser should I use to access the Front Office portal?

The following browsers are recommended: Chrome 65.0.3325.181; Firefox 59.0.2; Safari; Microsoft Edge

What help desk support is available for Front Office?

Information and other helpful tips and tricks for completing your application is available under the <u>Help and Resources</u> page of the AFA's website. If you have questions about your accessing or changing your username or password, please contact registrationafa@qov.ab.ca for assistance.

Can I submit my music or video files through Front Office?

No. Front Office does not currently allow submission of music or video files. Applicants must submit any such support materials in the manner outlined in the "How to Apply" section of your program guidelines. You can find your program guidelines at www.affta.ab.ca/funding/find-funding and view for more information.

I am having technical difficulties with Front Office. Will you still accept my application after the program

No. All applications must be received by 11:59 p.m. on the application deadline. Please view your program guidelines to ensure you are aware of the next deadline for submissions.

It is the applicant's responsibility to ensure their application is "Complete" in the Front Office portal before the deadline expires. No exceptions are made for late applications. If you are applying close to the deadline, please ensure you give yourself enough time to submit so the system can process your application well before the 11:59 p.m. deadline.

We strongly encourage applicants begin their applications several weeks in advance, and to complete them at least 3-5 days before a deadline. This allows adequate time to reach out to an Arts Development Consultant or registrationafa@gov.ab.ca if you run into technical difficulties or require consultation on submitting your application.

Can I submit my Final Report through Front Office?

Yes. Final Reports are ready for completion under the RECENT SUBMISSIONS bar on your main home page. Your Final Report will be listed as "In Progress" until it has been completed and submitted for review.

Can I delete an application after I started it?

No. You cannot delete an application once it has been started. However, your Arts Development Consultant can delete an "In Progress" application on your behalf. If you have already completed and submitted your application, your Arts Development Consultant can withdraw it for you, if you wish to cancel your request for funding

I work for an arts organization, and we have multiple staff that need to access our application. Can I have multiple log-ins?

Arts organizations often have several people involved in the creation and submission of an application. If you have multiple people that require access to your organization's information, you must request a separate and unique username and password for each of them. Registration requests should be sent directly to registrationafa@gov.ab.ca. To register, the email request must come from your organization's senior management team (i.e. Executive Director, Artistic Director, or Board Chair) indicating approval for you to access all application and final report data.

I used to work for an arts organization, but I am no longer there. What do I need to do?

Please contact registrationafa@gov.ab.ca to notify us that you are no longer with an organization.

I moved after I submitted my application. Can I update my contact information?

Once an application has been completed and submitted, you cannot make any changes to your submission directly. You must contact the Arts Development Consultant responsible for your program to ensure address, email, and phone numbers are upto-date with our office. If your application is still "In Progress" you can update the information before you submit. However, please remember to also update your profile information in Front Office, using the instructions included in the user guide.

If you have specific questions about the content of your grant application, please contact the Arts Development Consultant responsible for your grant (contact info available on the <u>program quidelines</u> for your grant.)

The Alberta Foundation for the Arts

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