

Theatre Individual Project Funding

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How to Use GATE to apply for

Theatre Individual Project Funding

Step 1: log on to GATE https://gate.alberta.ca/gate/frontOffice.jsf. in Google Chrome or Internet Explorer





Online Grant Application System

Welcome to the Online Grant Application System for Alberta Culture and Tourism, the Alberta Foundation for the Arts and Alberta Sport Connection & Alberta Human Services.

The system may be used to submit applications and/or final reporting information for the following Alberta Culture and Tourism programs:

- Alberta Media Fund http://culture.alberta.ca/mediafund
 - » Reminder: As of March 2015 there will be only one annual intake for the Alberta Media Fund, Project Script Development program.

The system may be used to submit applications and reporting information for the following Alberta Foundation for the Arts programs:

- Individual Artists Project Grant http://affta.ab.ca/Grants/Individual-Project-Grants
- Organizational project Grant http://affta.ab.ca/Grants/Organizational-Project-Grants
- Organizational Operating Grant http://affta.ab.ca/Grants/Organization-Operational-Grants
- Awards and Scholarships http://affta.ab.ca/Grants/Awards-and-Scholarships
- Art Acquisition by Application http://affta.ab.ca/Art-Collection/Acquisitions-and-Programming

The system may be used to submit applications for the following Alberta Sport Connection programs:

• Podium Alberta - http://albertasport.ca/grant-funding-programs/podium-alberta

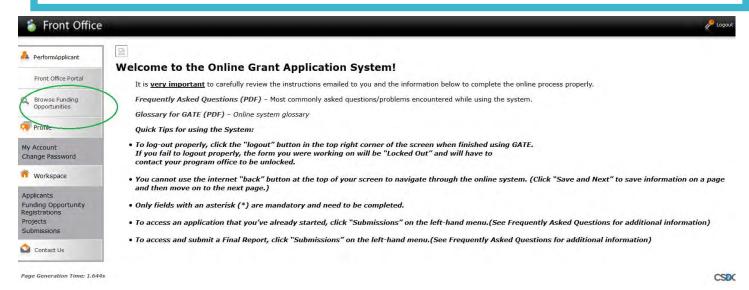
The system may be used to submit applications and reporting information for the following Alberta Human Services programs:

• Family & Community Safety Program grant - http://humanservices.alberta.ca/abuse-bullying

The system maybe expanded to include other grants programs in the future.

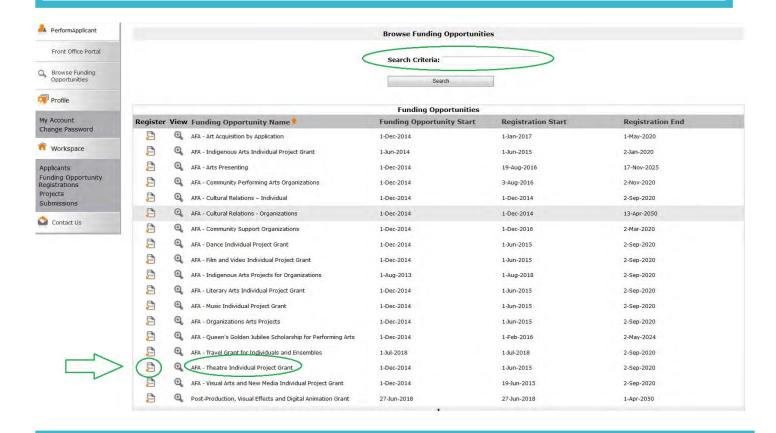
Please note this system cannot be used to submit applications or final reports for the Community Initiatives Program and Community Facility Enhancement Program.

Step 2: click on Browse Funding Opportunities in the left menu.

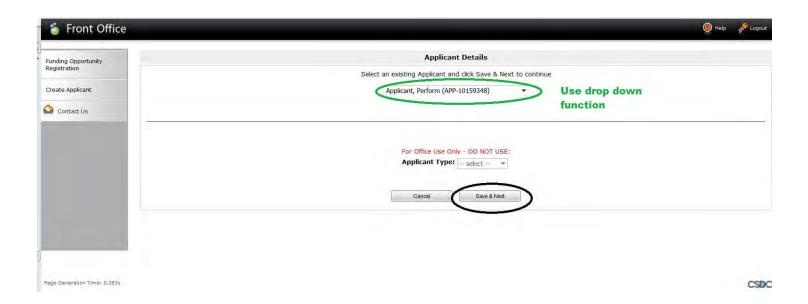


2

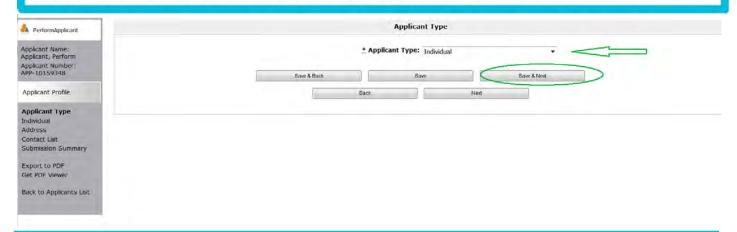
Step 3: - type *Theatre Individual Project Grant* in the Search Criteria box, OR
- scroll down the page, *Theatre Individual Project Grant*, and click on icon under Register



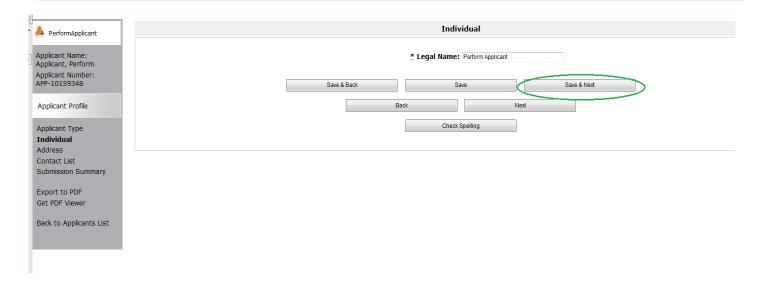
Step 4: use the dropdown menu to choose your name with applicant number. Do not do anything else and click *Save & Next*.



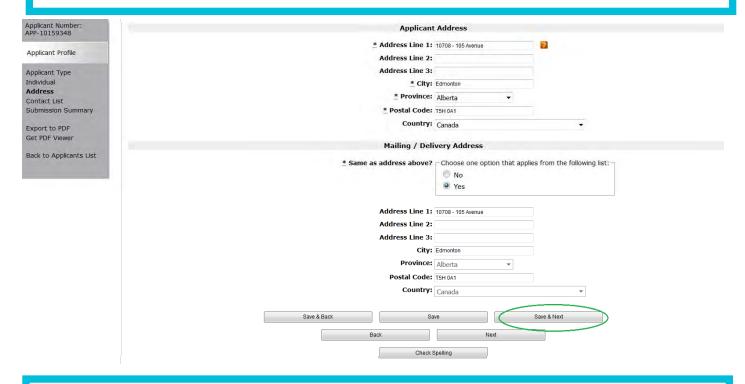
Step 5: on the Applicant Type page choose Individual from the drop-down menu. Click Save & Next.



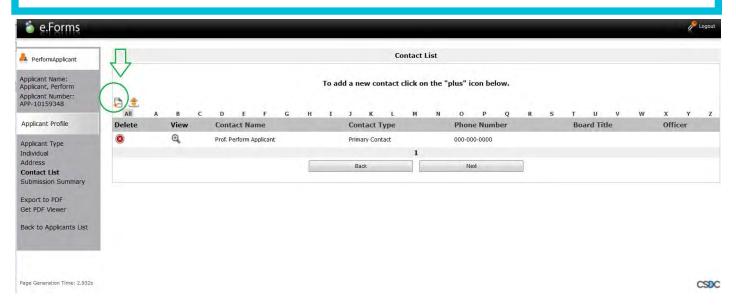
Step 6: on the **Individual** page enter your legal name (first name and then last name) in the Legal Name box. Click *Save & Next*.



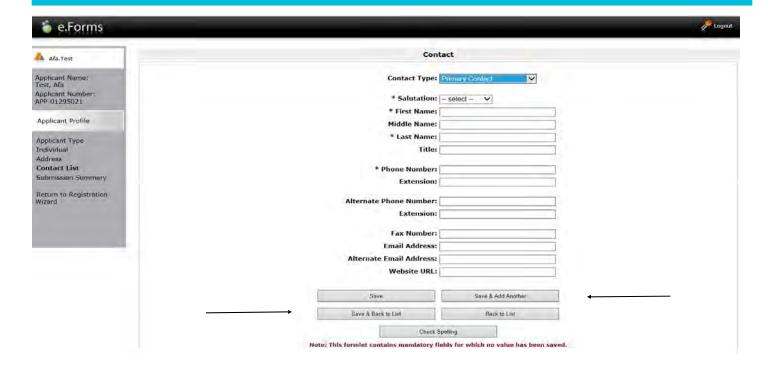
Step 7: on the Address page fill in all questions with an asterisk. Click Save & Next when finished.



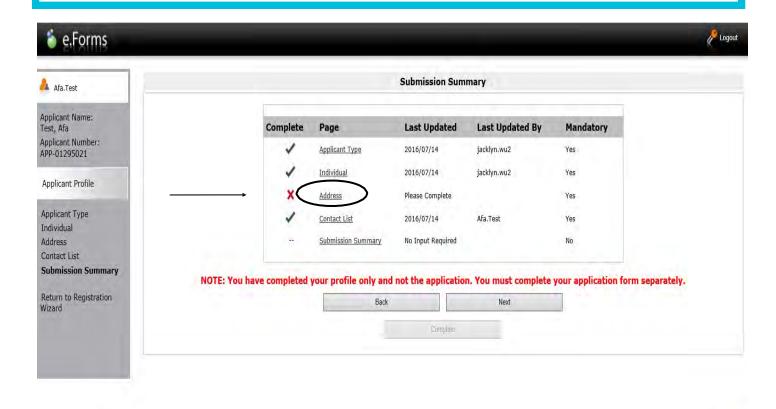
Step 8: on the **Contact List** page add yourself and others, as needed, by clicking the paper icon with the plus sign.



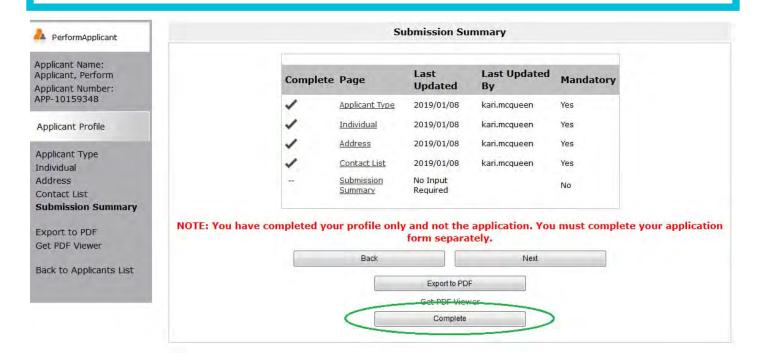
Step 9: when you click the paper icon with the plus sign this form appears. Fill out the boxes as requested. Click on *Save & Back to List* when finished or, if you need to add another name, click on *Save & Add Another*. When you return to the main Contact List page, click *Next* to proceed to the Submission Summary screen.



Step 10: this last page of the profile is the **Submission Summary**. The green \checkmark indicates you have completed your profile correctly. If you see a red X, click on the page beside the red X to correct or complete any missing items.



Step 11: now, and only now, when you see all green ✓ can you click on the *Complete* button. You have now completed your profile. When you click on *Complete* you will move to a page called **Complete Applicant Profile** (next page of instructions) where you will start filling out a project application.



NOTE: you can go into your profile anytime and update information:

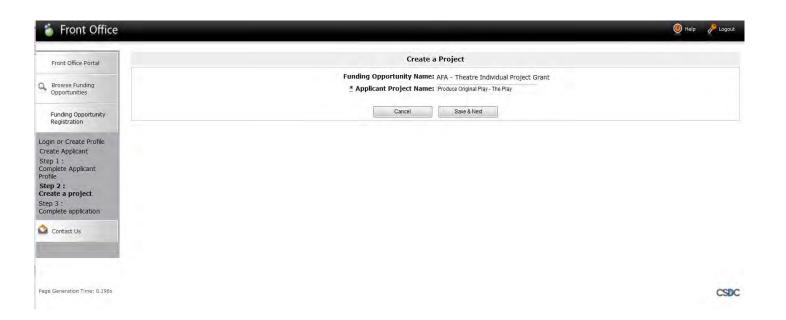
- Log on to GATE: https://gate.alberta.ca/gate/frontOffice.jsf
- click on Applicants in the grey menu at the left
- click on the orange folder beside your organization name
- once your profile page has loaded, click on "Submission Summary" in the grey menu at the left
- click on the "Edit" button in the middle of the screen
- click on any item above that is underlined (e.g. Contact List). Make the changes you wish, save the page, and then go back to Submission Summary and click the "Complete" button (used to be edit). Very important to do this last step to get out of edit mode.

More detailed instructions with screen shots on how to edit your profile after you initially create it, are found on pages 19-22.

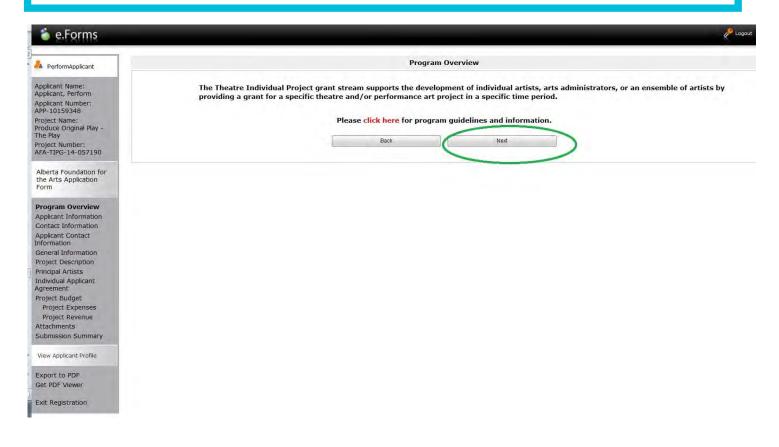
Step 12: since you have already completed your profile you can click *Next* to start your project. Notice in the grey menu to the left that you are beginning *Step 2: create a project*.



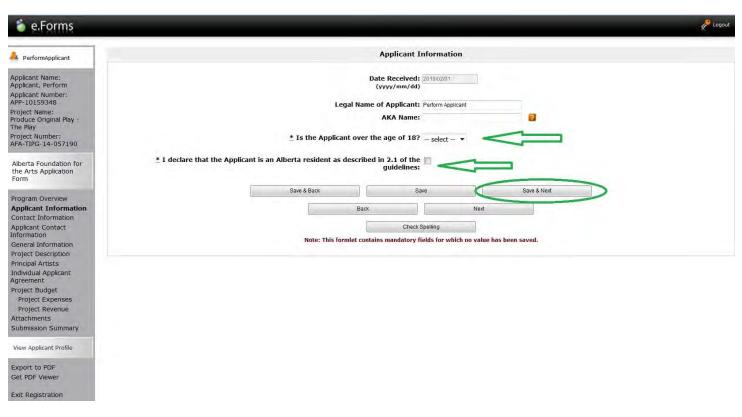
Step 13: Name your project by typing in the box. Note: you cannot go back and change the name so make sure you are happy with the name of your project before you click *Save & Next*.



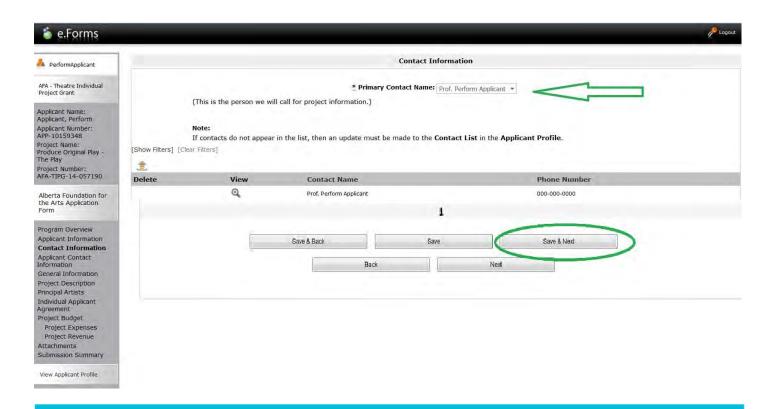
Step 14: if you would like to review the program guidelines click on click here. Otherwise click Next.



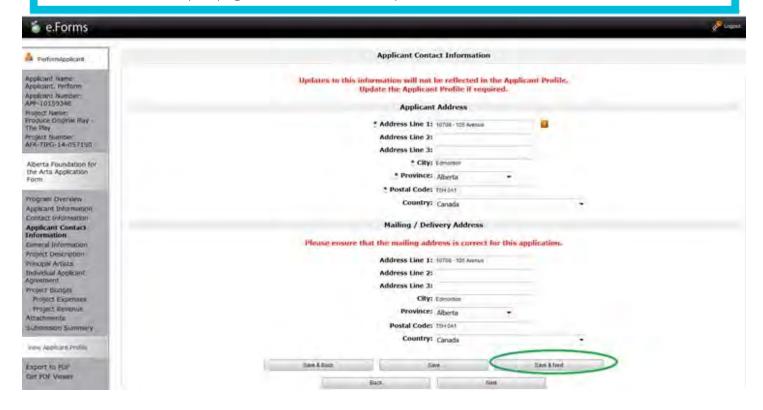
Step 15: just complete the two questions with the asterisk. Click Save & Next.



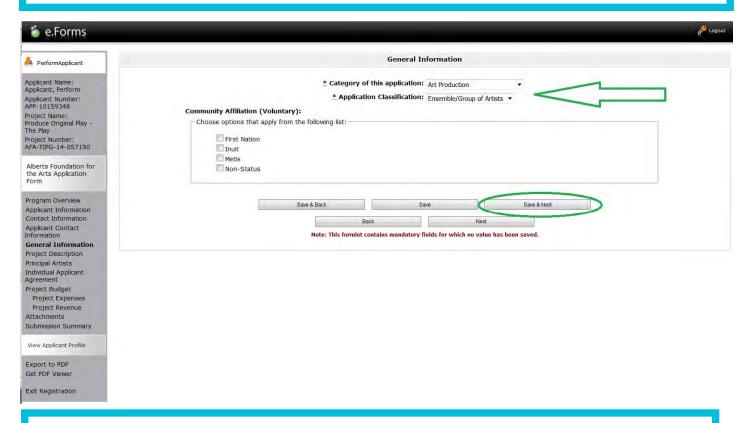
Step 16: on the Contact Information page choose your name from the drop-down box. Click Save & Next.



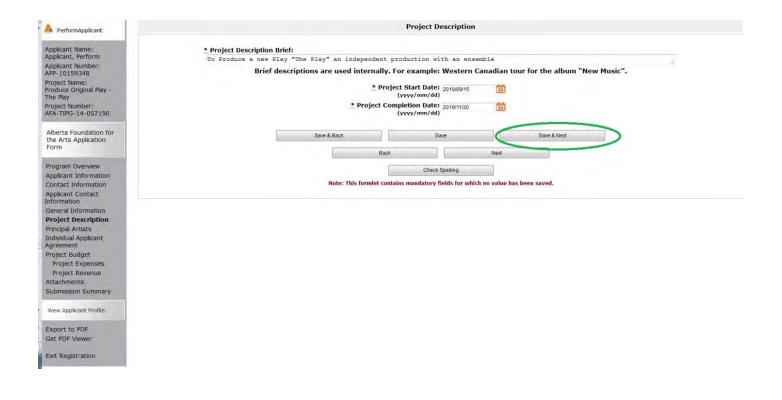
Step 17: on the **Applicant Contact Information** page verify that your information is correct. If not, go ahead and make the changes (the boxes are live). Please remember to go back to your profile and update your address there as well (see pages 19-22 for instructions). Click *Save & Next*.



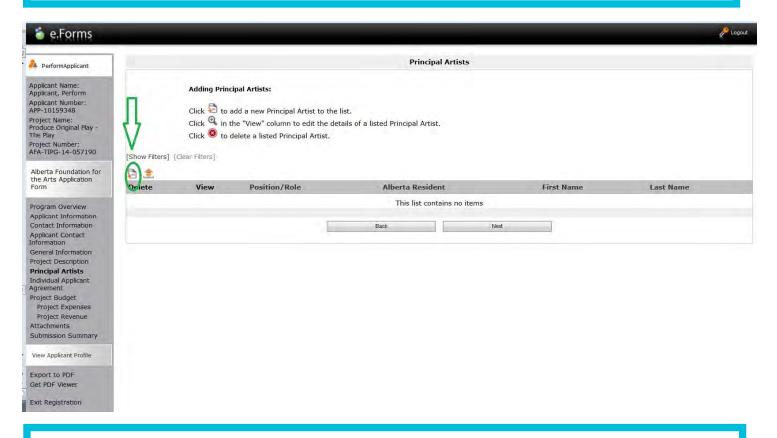
Step 18: choose the appropriate category from the drop-down menu and if the application is for an individual or ensemble. Community Affiliation is voluntary so only complete this if you so choose. Click *Save & Next*.



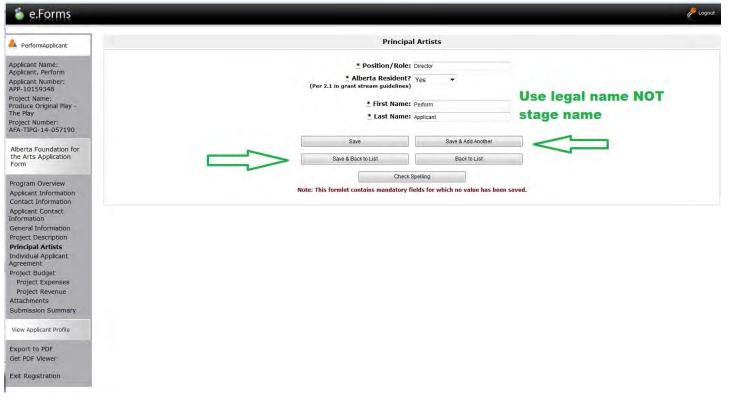
Step 19: provide a brief project description and choose start and end dates for your project. **Note:** the start date cannot be before the date the application is submitted. Click *Save and Next*.



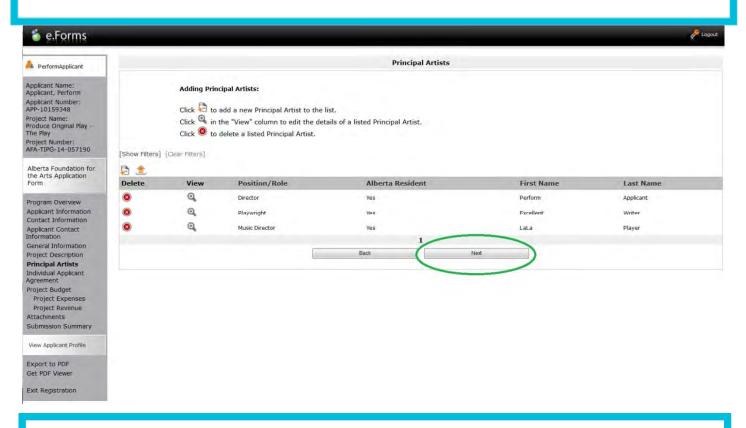
Step 20: on this page you need to designate yourself as the artist of your project by clicking + icon. If you are part of an ensemble, add all other key creative artists by clicking the + icon each time.



Step 21: this is the form that appears after clicking on the + icon described above. Depending on your project, click Save & Add Another or Save and Back to List.

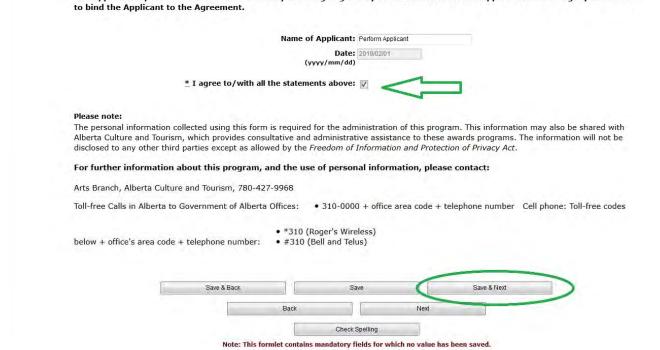


Step 22: this is what the screen looks like after you add yourself as an artist and others (if applicable). Click Next.

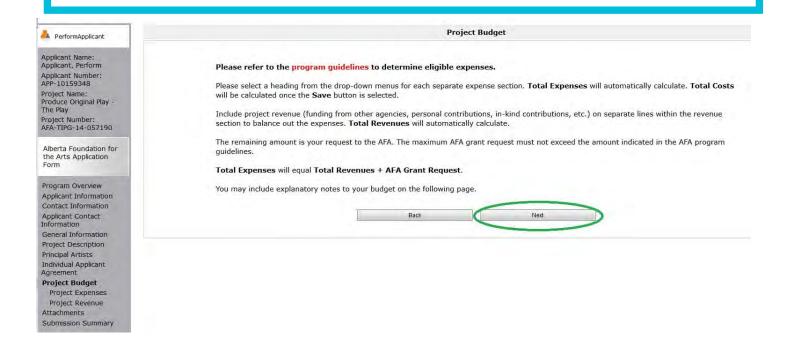


Step 23: Read the **Individual Applicant Agreement** in its entirety and click the box marked with an asterisk. Click *Save & Next*.

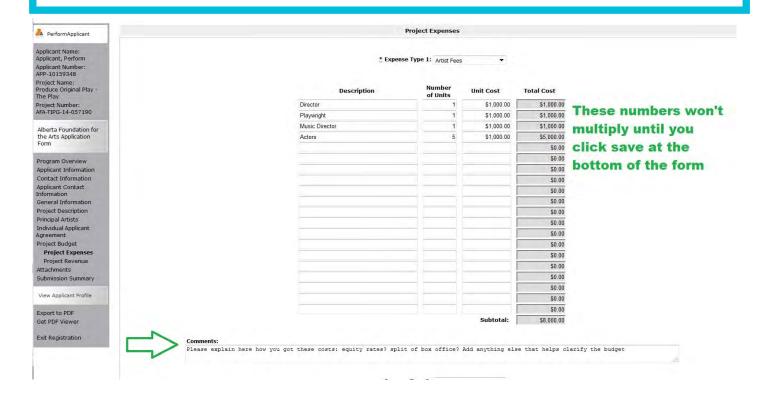
- 15. This Agreement may not be assigned by the Applicant.16. The Applicant will recognize the source of the Grant as required by the Guidelines.
- The Applicant represents and warrants that the person signing is duly authorized to make the Application and is legally sufficient to bind the Applicant to the Agreement



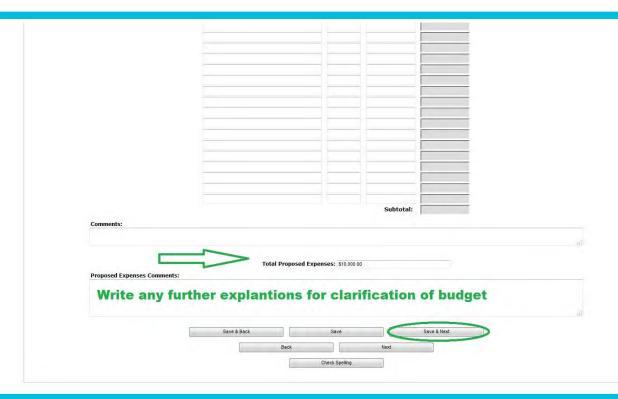
Step 24: the Project Budget page explains the next two screens. Read through the text and click Next.



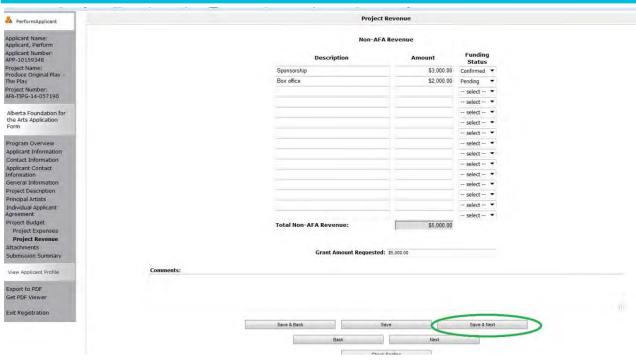
Step 25: on the **Project Expenses** page there are four opportunities to choose an expense type from the dropdown menus and input details. There is also a comments box after each expense type to further clarify if necessary.



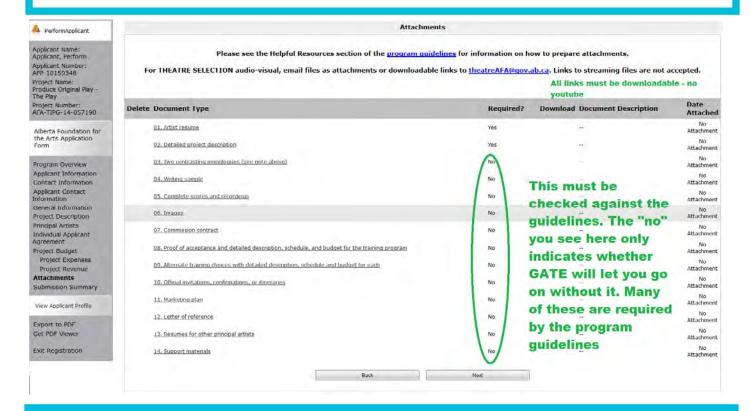
Step 26: still on the **Project Expenses** page, the screen shot below shows the lower part of the page and the Total Proposed Expenses box. This automatically fills in when you click *Save*. There is also a larger Proposed Expenses Comments box if you have more details to share about your budget. When you are finished with your budget expenses make sure you save the material and click *Next*.



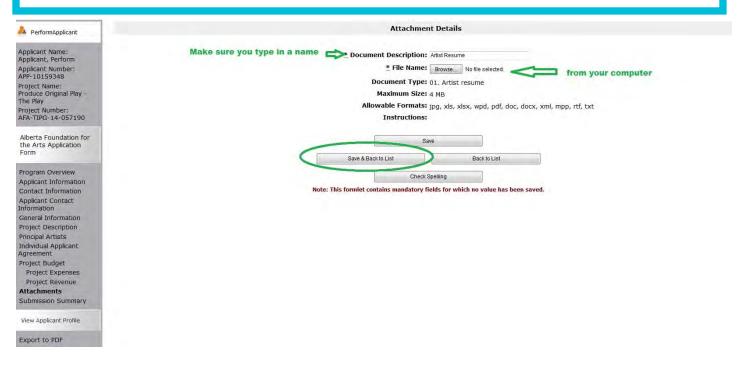
Step 27: on the **Project Revenue** page input any revenue you may have toward the project. Indicate if the funds are confirmed or pending from the dropdown box under Funding Status. There is also a comment box you can use. When you slick *Save*, the Grant Amount Requested box automatically fills in. Click Save & *Next* when you are finished.



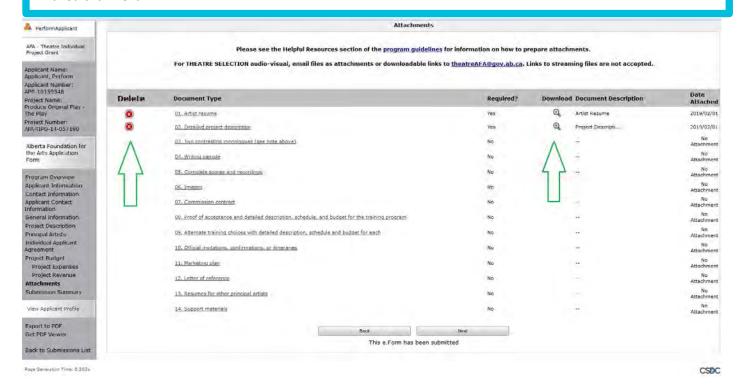
Step 28: on the **Attachments** page click on the underlined document type to upload the requested document. You must upload information for any lines listed *Yes* for required documents. To add additional support material that is relevant to your project, you can choose any of the other document types to upload a file.



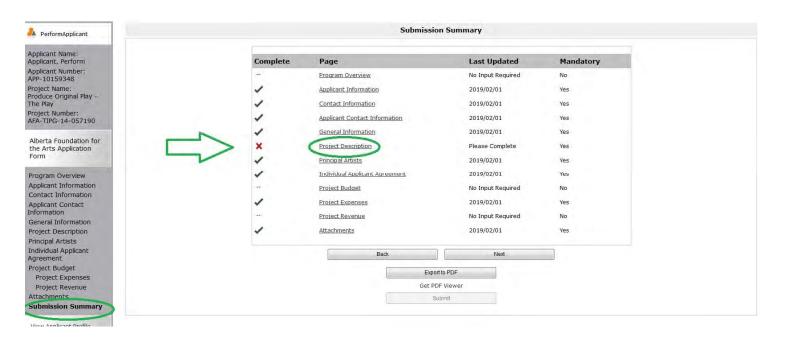
Step 29: when you click on a page you land on **Attachment Details**. Fill in the document description box and click on *Browse* to upload the document from your own files. Click on *Save & Back to List* to upload the remaining mandatory items by clicking on the next document type and repeating. Add any other material if relevant to your application.



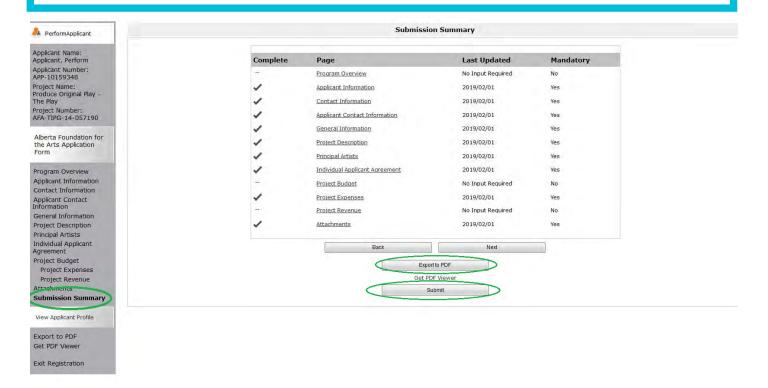
Step 30: When all attachments are uploaded this is what the screen looks like. You can delete a document if you have uploaded it in error by clicking on You can also view the file you uploaded by clicking When you are finished click *Next*.



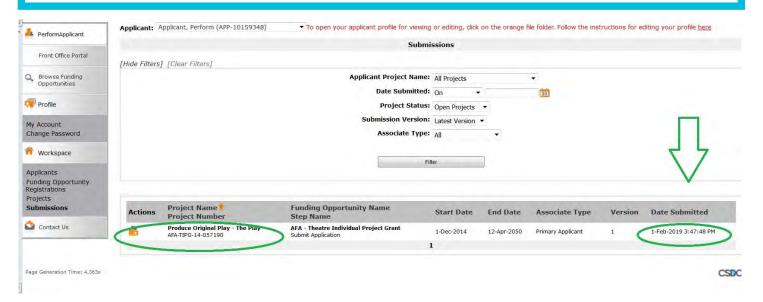
Step 31: this last page, *Submission Summary*, summarizes all the previous pages that you completed. If, for some reason, you missed an item on a previous page, you will see a red X beside the page as per sample below. Click on the underlined page beside the X, complete the page, and save. Go directly to the *Submission Summary* page by clicking *Submission Summary* in the grey menu to the left. Repeat for every red X until you see a green ✓ beside every page.



Step 32: Now, and only with all green ✓, you can hit *Submit*. **But, before you do that**, you can print out a paper copy of your submission if you wish. Just click on *Export to PDF*. Then, go back and click *Submit*.



Step 33: After submitting, the screen reverts to *Submissions* where you will see your application was submitted successfully with a project number, time and date. You will receive an e-mail confirming your submission has been received, plus you will continue to receive e-mails as your application is processed. **Congratulations on submitting your application!**



How to update or edit your profile

Step 1: log on to GATE https://gate.alberta.ca/gate/frontOffice.jsf. If you are prompted to change your password, please complete the steps outlined, and save your new password in a safe place.





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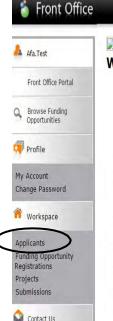
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Please note this system cannot be used to submit applications or final reports for the Community Initiatives Program and Community Facility Enhancement Program.

Step 2: click on Applicants in the left menu.



Welcome to the Online Grant Application System!

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Frequently Asked Questions (PDF) - Most commonly asked questions/problems encountered while using the system.

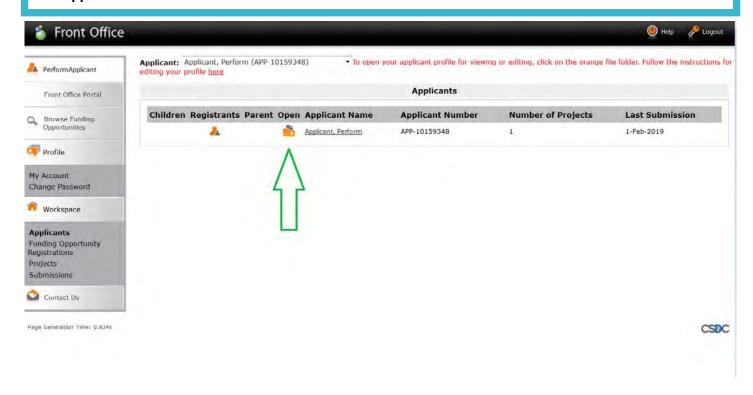
Glossary for GATE (PDF) - Online system glossary

Quick Tips for using the System:

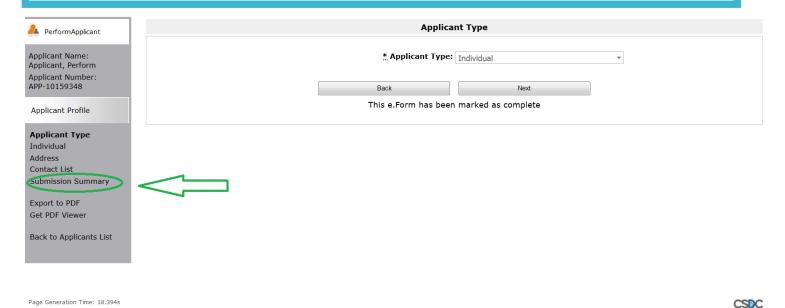
- To log-out properly, click the "logout" button in the top right corner of the screen when finished using GATE.
 If you fail to logout properly, the form you were working on will be "Locked Out" and will have to
 contact your program office to be unlocked.
- You cannot use the internet "back" button at the top of your screen to navigate through the online system. (Click "Save and Next" to save information on a page and then move on to the next page.)
- Only fields with an asterisk (*) are mandatory and need to be completed.
- To access an application that you've already started, click "Submissions" on the left-hand menu.(See Frequently Asked Questions for additional information)
- To access and submit a Final Report, click "Submissions" on the left-hand menu. (See Frequently Asked Questions for additional information)



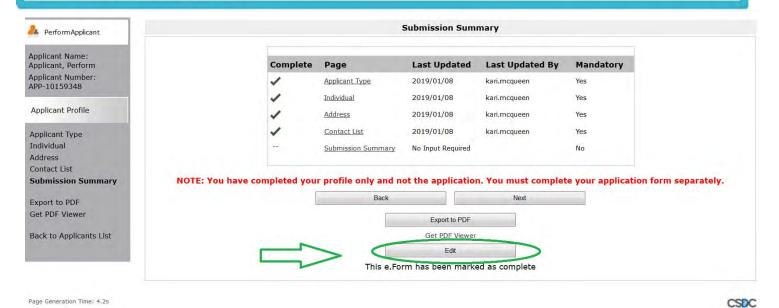
Step 3: make sure your correct applicant appears in the dropdown box and click on the orange folder beside **Applicant Name**.



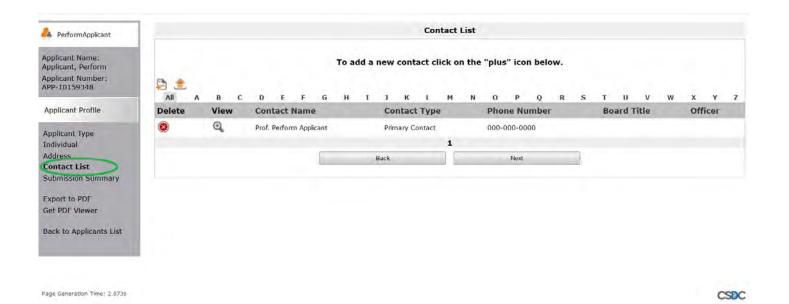
Step 4: click on Submission Summary in the grey menu at the left.



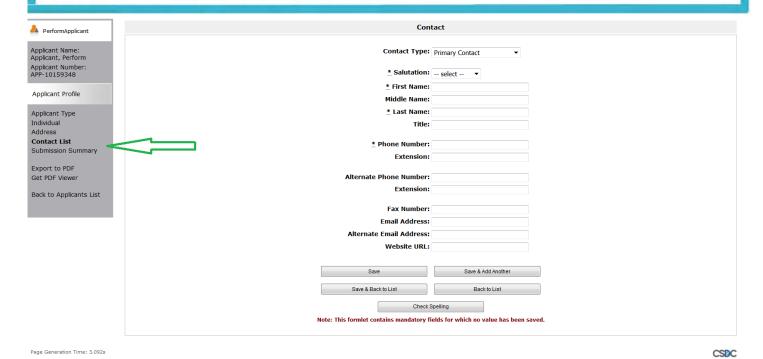
Step 5: click on the Edit button in the middle of the page at the bottom and then click on any page underlined above that you wish to edit.



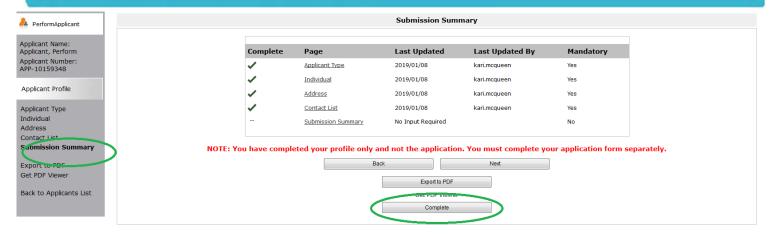
Step 6: this example shows how you can make a change to the *Contact List* page. You can click on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name, add a new person by clicking on ledelete any name and ledelete an



Step 7: when you click on to add a person, this page appears. Fill in all the boxes with an asterisk and click either Save or Save & Add Another. Make any other changes you like to your profile by clicking any item from the list in the grey menu at the left.



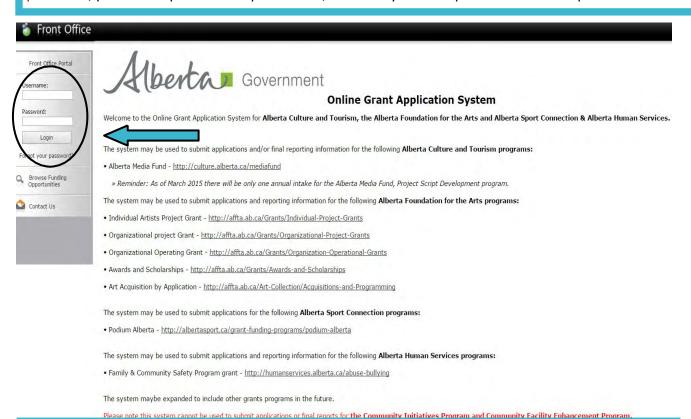
Step 8: when you have finished making all the updates to your profile, go back to the Submission Summary page by clicking Submission Summary in the grey menu at the left. The Edit button has changed back to Complete. Click Complete to get out of edit mode.



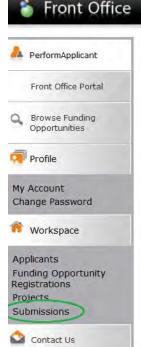
Page Generation Time: 2,905s

How to complete your final report for a previous project

Step 1: log on to GATE https://gate.alberta.ca/gate/frontOffice.jsf. If you are prompted to change your password, please complete the steps outlined, and save your new password in a safe place.



Step 2: click on *Submissions* in the grey menu at the left.



Welcome to the Online Grant Application System!

It is <u>very important</u> to carefully review the instructions emailed to you and the information below to complete the online process properly.

🔑 Logout

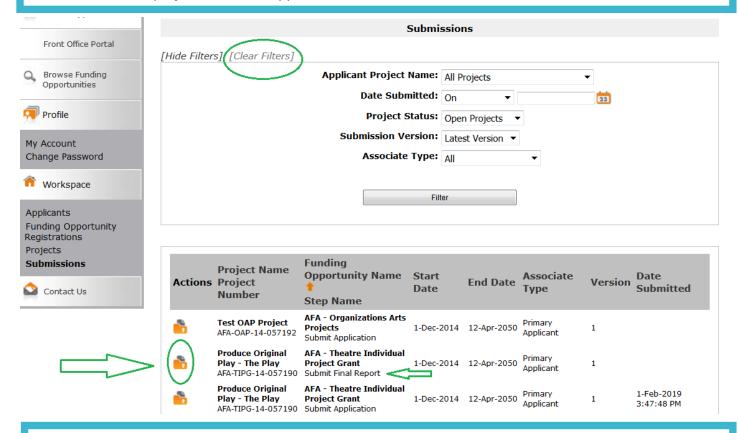
Frequently Asked Questions (PDF) - Most commonly asked questions/problems encountered while using the system.

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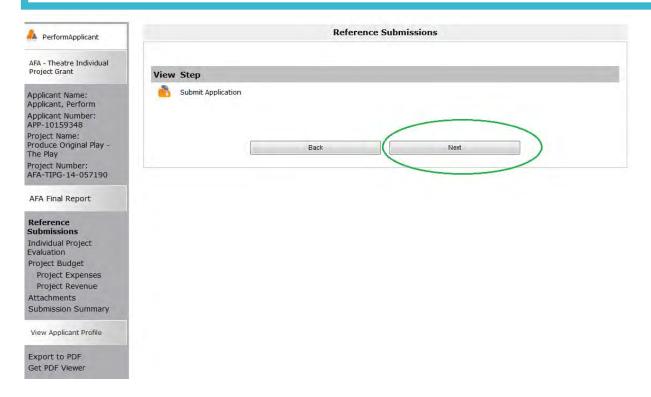
Quick Tips for using the System:

- To log-out properly, click the "logout" button in the top right corner of the screen when finished using GATE.
- If you fail to logout properly, the form you were working on will be "Locked Out" and will have to contact your program office to be unlocked.
- You cannot use the internet "back" button at the top of your screen to navigate through the online system. (Click "Save and Next" to save information on a page and then move on to the next page.)
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- To access an application that you've already started, click "Submissions" on the left-hand menu. (See Frequently Asked Questions for additional information)
- To access and submit a Final Report, click "Submissions" on the left-hand menu. (See Frequently Asked Questions for additional information)

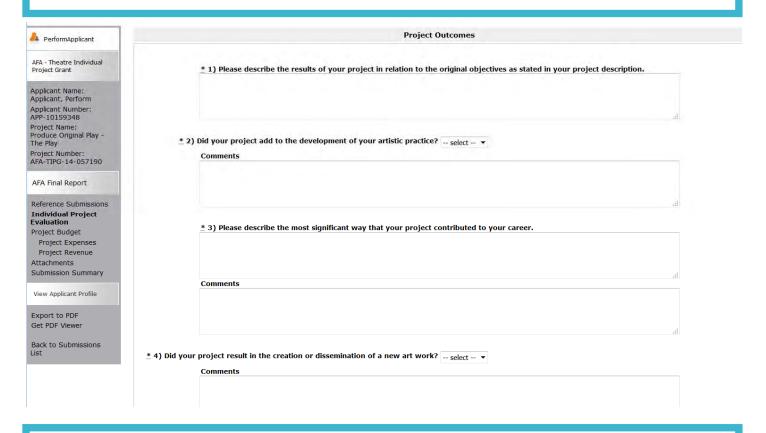
Step 3: look for your project name, number, and the step name (Submit Final Report). Click on the orange folder under the Actions column. If you can't see this orange folder, click on [Clear Filters] near the top left of the screen. Your project folder will appear.



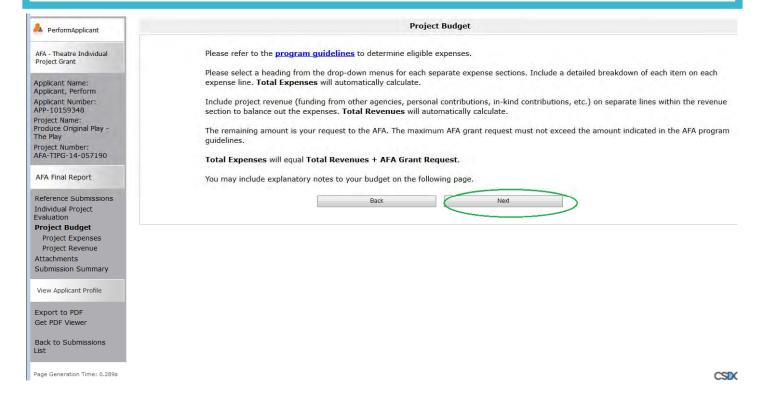
Step 4: Click on the orange folder beside "Submit Application" if you would like to view your original application. If you don't need to view this, click *Next*.



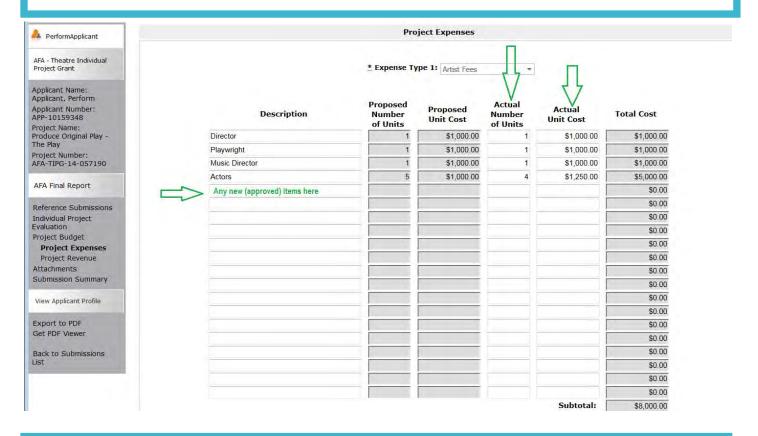
Step 5: fill out all boxes marked with an asterisk on the **Individual Project Evaluation** page. Every box marked with an asterisk requires data. Click *Save & Next* when you are ready to move on.



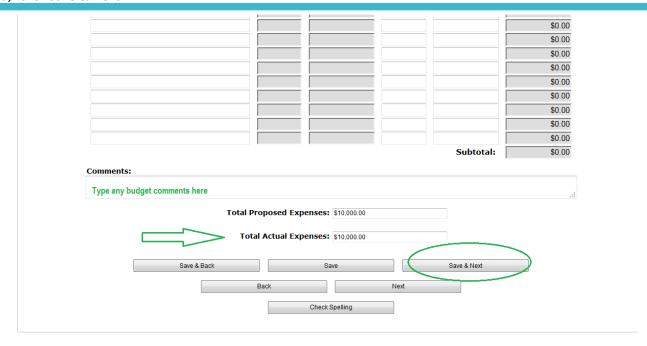
Step 6: read through the information on the **Project Budget** page which will assist with the next two pages . Click *Next* when you are ready to move on.



Step 7: all data you inputted in your original application budget appears here (shaded in grey) under the various expenses types, and cannot be altered. Fill in the Actual Number of Units and Actual Unit Cost. If you did not incur any expenses on a proposed budget item, enter "0" for units and "0" for dollars. If you have a new cost, you can add the line item(s) under Description and input the actual number of units and cost.



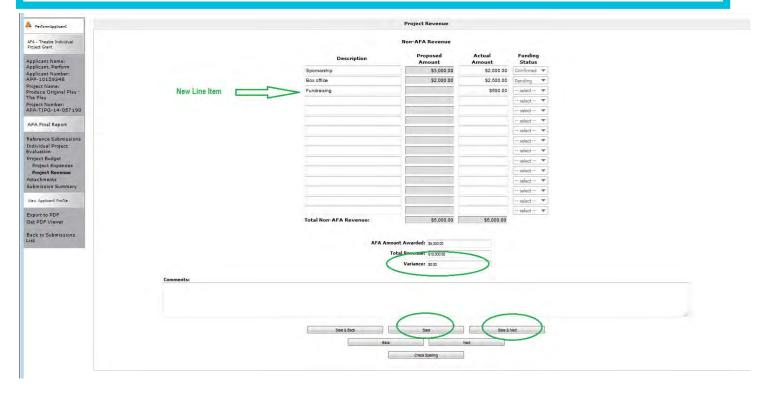
Step 8: still on the same page, when you scroll down and click *Save*, the total in the Total Actual Expenses box automatically fills in. You can also type any comments you wish to make in the boxes provided. When you are finished, click *Save & Next*.



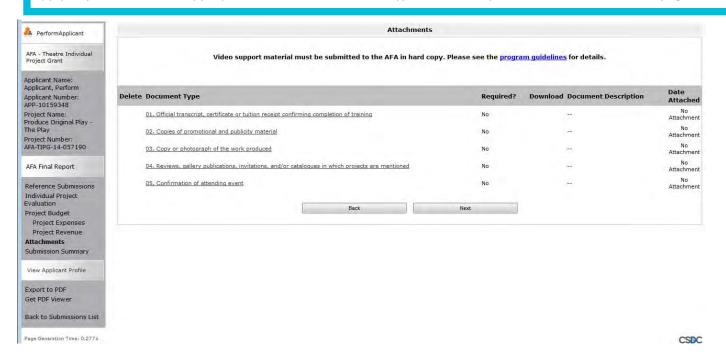
Step 9: on the **Project Revenue** page, fill in your project revenue in the Actual Amount column. Your proposed revenue appears in the shaded grey column. In the sample below, **before** the actual amounts are added, you see the variance is -\$5,000.00



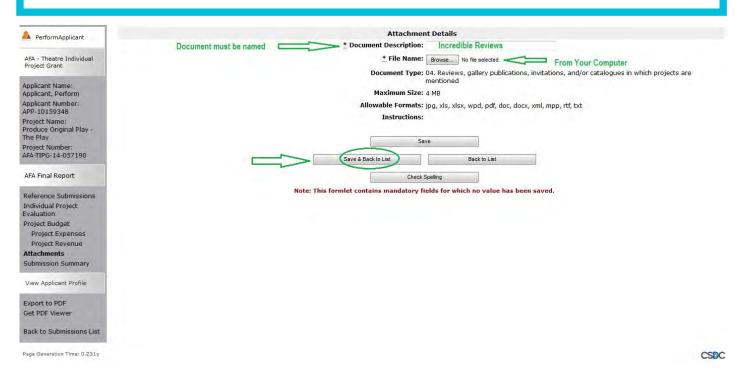
Step 10: when the actual amounts are filled in, and you click *Save*, you should see 0 in the variance box. If not, go back to the expense page & review what you have inputted. If you need assistance, please contact the development consultant before you submit your final report. You want 0 in the variance box before moving on.



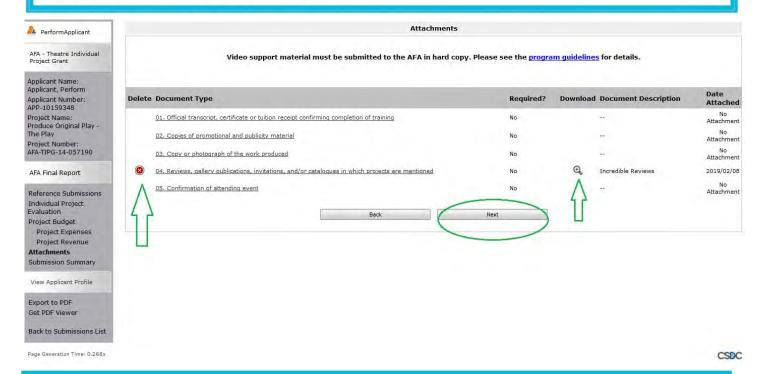
Step 11: next on the **Attachments** page, upload all relevant material to your project. Not all the documents listed may apply to you. Click on the appropriate underlined document type which will open the **Attachments Details** page.



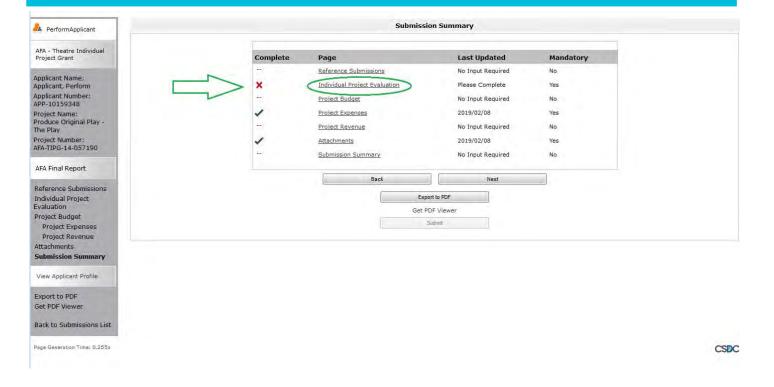
Step 12: on the **Attachments Details** page, name the document you are uploading in the Document Description box. Then click on the *Browse* button to upload the document from your files. Click *Save & Back to List*.



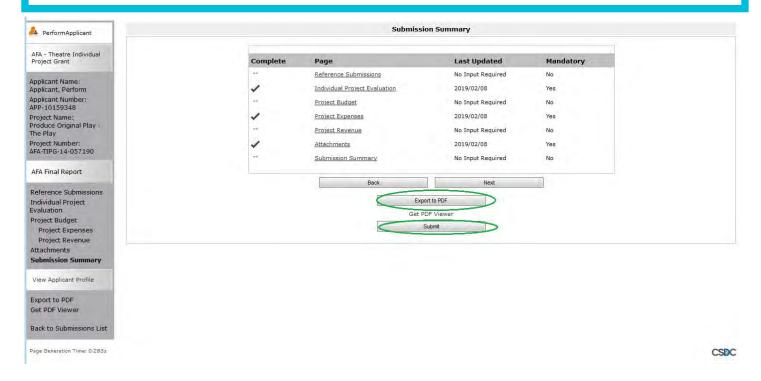
 $Step \cdot 13 : \text{if-you-have-any-more-documents-to-upload, click-on-one-of-the-underlined-options-and-repeat-the-step.-You} \\ \underline{\text{can-delete-a-document-if-you-have-uploaded-it-in-error-by-clicking-on-}} \cdot \text{You-can-also-view-the-file-you-uploaded-by} \\ \underline{\text{clicking-}} \cdot \underbrace{\text{Olicking-on-}}_{\text{When-you-are-finished-click-}} \cdot \text{Next.} \\ \P$



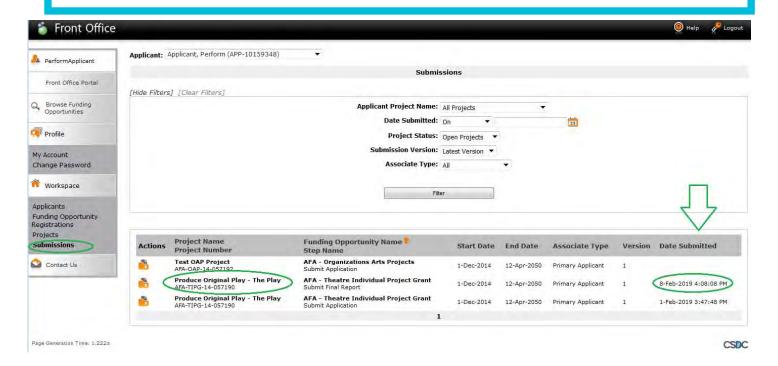
Step 14: the last screen is the **Submission Summary** page. It summarizes all the previous pages. If you see a red X something is missing or incomplete on that page. Click on the underlined page and complete it. Make sure you save your additions or corrections. Click on **Submission Summary** again in the left column to confirm you have all green checkmarks.



Step 15: now, and only with all green ✓, you can hit *Submit*. **But, before you do that**, you can print out a paper copy of your submission if you wish. Just click on *Export to PDF*. Then, go back and click *Submit*.

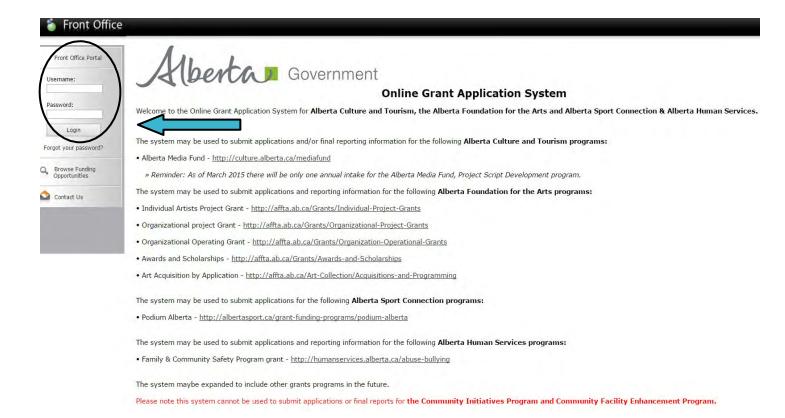


Step 16: after submitting, the screen reverts to *Submissions* where you will see your final report was submitted successfully with the time and date. You will also receive an e-mail confirming your submission has been received. **Congratulations on submitting your final report!**

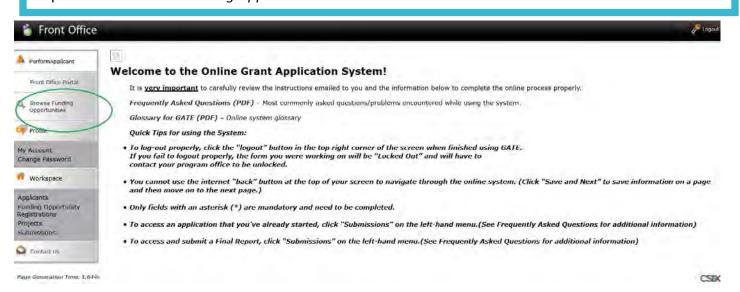


How to start a new Theatre arts application in GATE

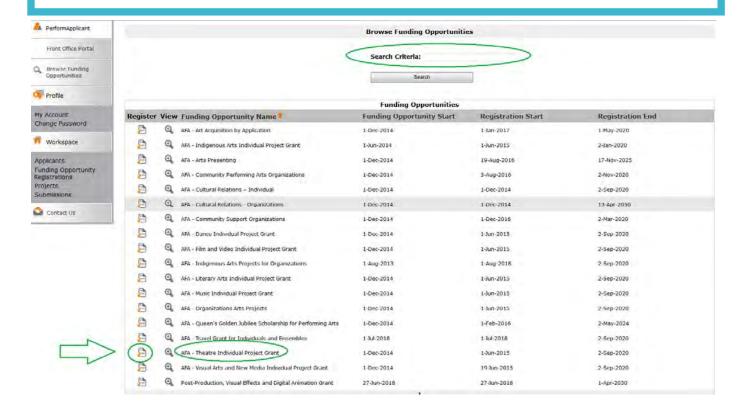
Step 1: log on to GATE https://gate.alberta.ca/gate/frontOffice.jsf. If you are prompted to **change your password**, please complete the steps outlined, and save your new password in a safe place.



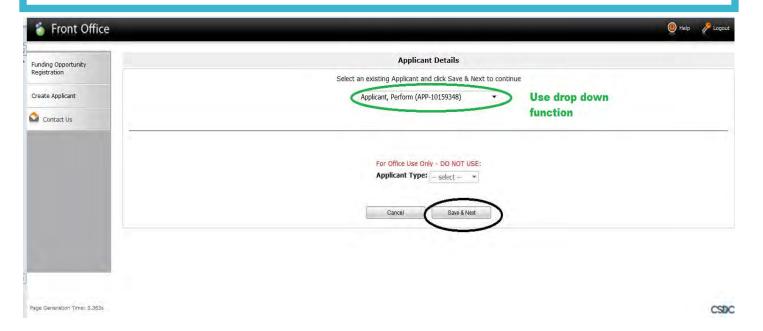
Step 2: click on Browse Funding Opportunities in the left menu.



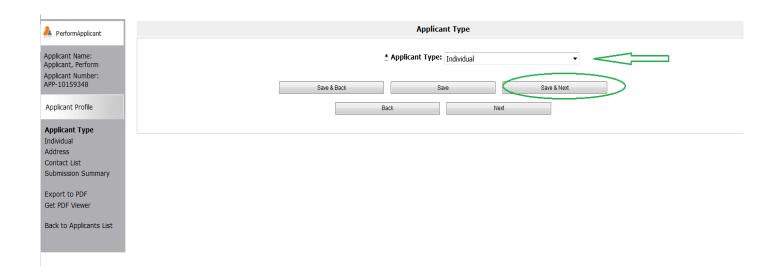
Step 3: - type *Theatre Individual Project Grant* in the Search Criteria box, OR
- scroll down the page, find *Theatre Individual Project Grant*, and click on icon under Register



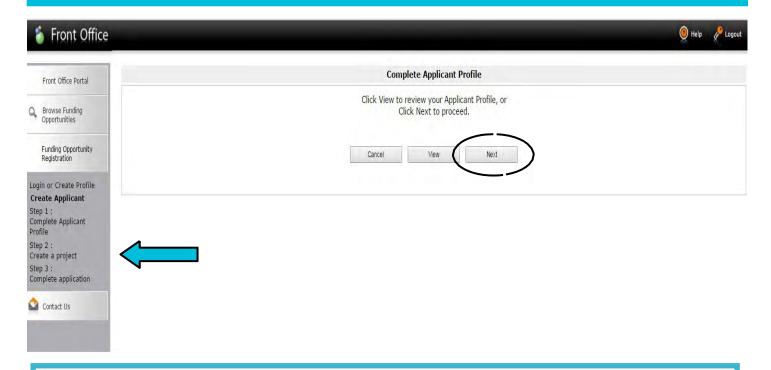
Step 4: Step 4: use the dropdown menu to choose your name with applicant number. Do not do anything else and click *Save & Next*.



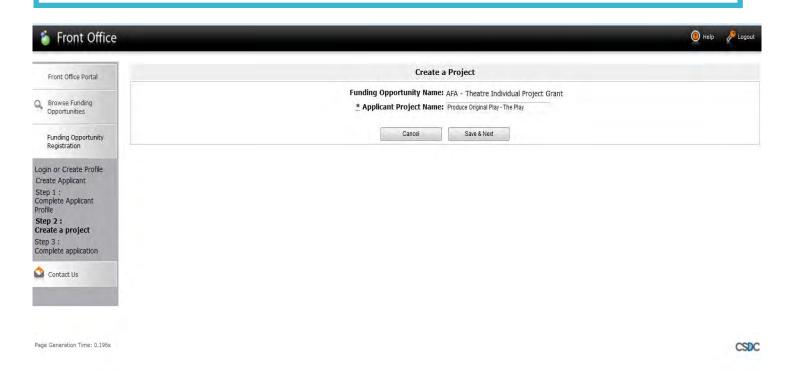
Step 5: ignore main screen and just click *Return to Registration Wizard* in the grey menu at the left. This allows you to bypass the rest of the profile pages and start your new application.



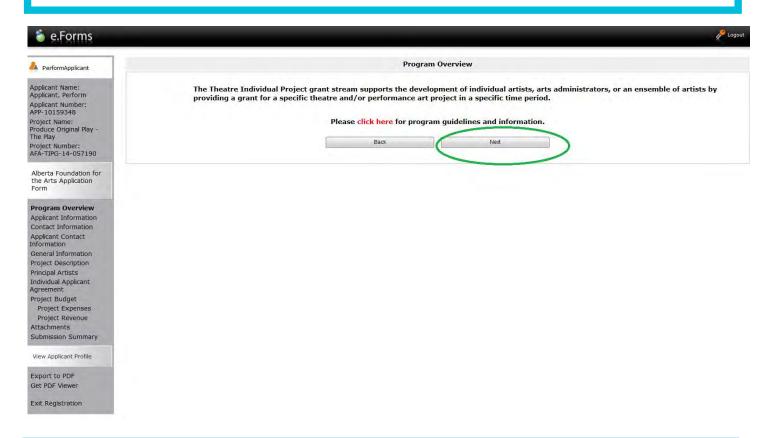
Step 6: since you have already updated or edited your profile you can click *Next* to start a new application. Notice in the grey menu to the left that you are beginning *Step 2: create a project*.



Step 7: name your project by typing in the box. Note: you cannot go back and change the name so make sure you are happy with the name of your project before you click *Save & Next*.



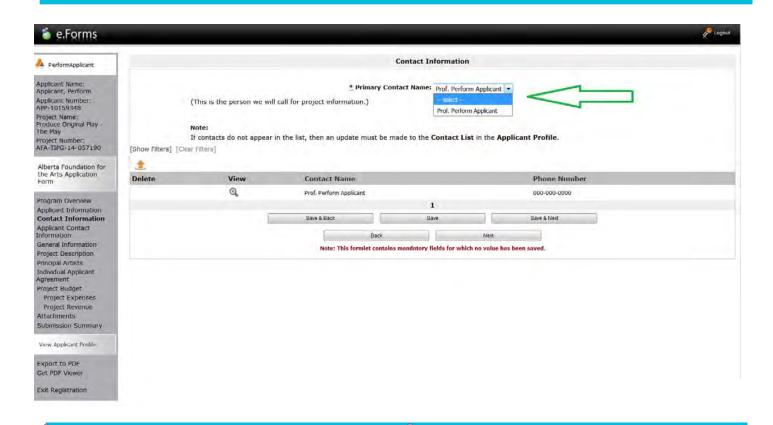
Step 8: if you would like to review the program guidelines click on click here. Otherwise click Next.



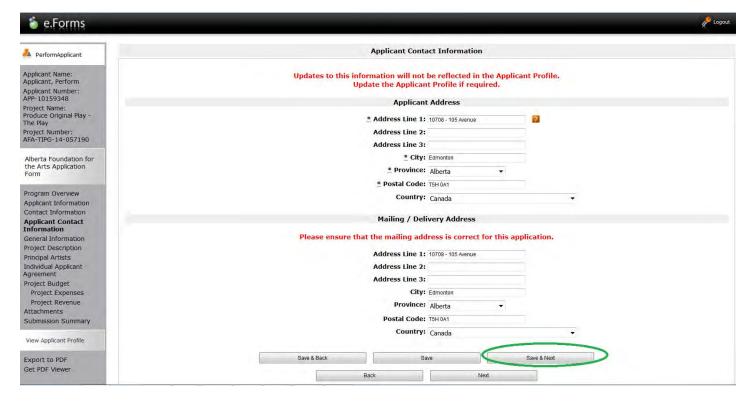
Step 9: on the Applicant Information page just complete the two questions with the asterisk. Click Save & Next.



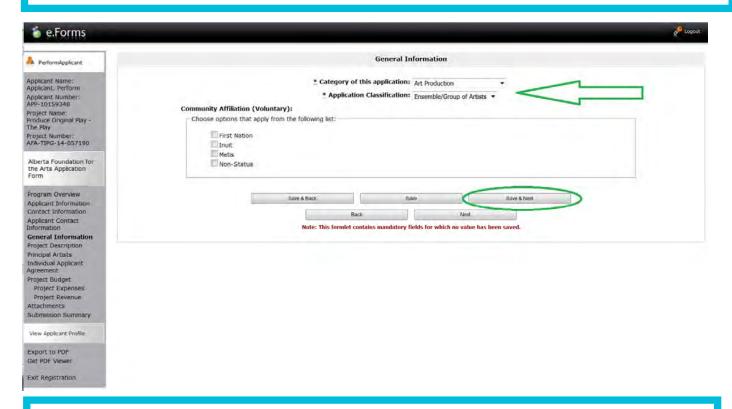
Step 10: on the Contact Information page choose your name from the drop-down box. Click Save & Next.



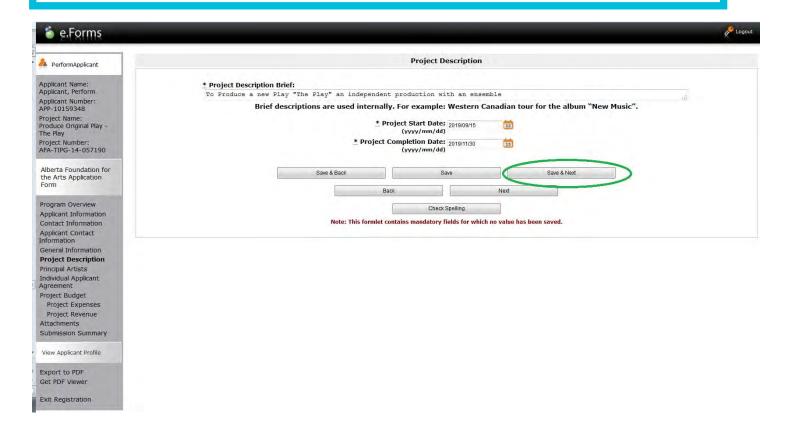
 $Step \cdot 11 : on the \cdot \textbf{Applicant Contact Information} page verify that \cdot your \cdot information is correct. \cdot If \cdot not, go \cdot ahead and make the \cdot changes (the \cdot boxes are live). \cdot Please remember to \cdot go \cdot back \cdot to \cdot your \cdot profile and \cdot update \cdot your \cdot address there as \cdot well \cdot (see pages \cdot 19 - 22 \cdot for \cdot instructions). \cdot Click \cdot Save & \cdot Next. \P$



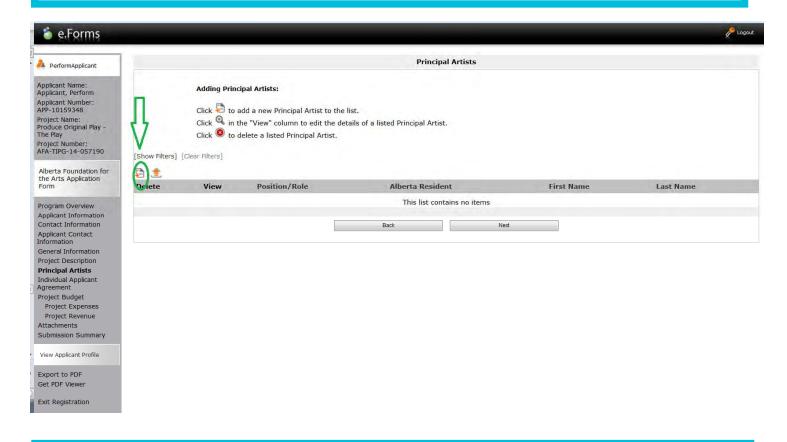
Step 12: Choose the appropriate category from the drop-down menu and if the application is for an individual or ensemble. Community Affiliation is voluntary so only complete this if you so choose. Click *Save & Next*.



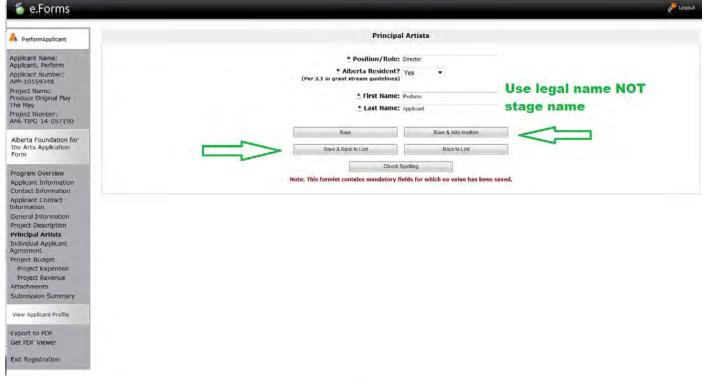
Step 13: provide a brief project description and choose start and end dates for your project. **Note:** the start date cannot be before the date the application is submitted. Click *Save and Next*.



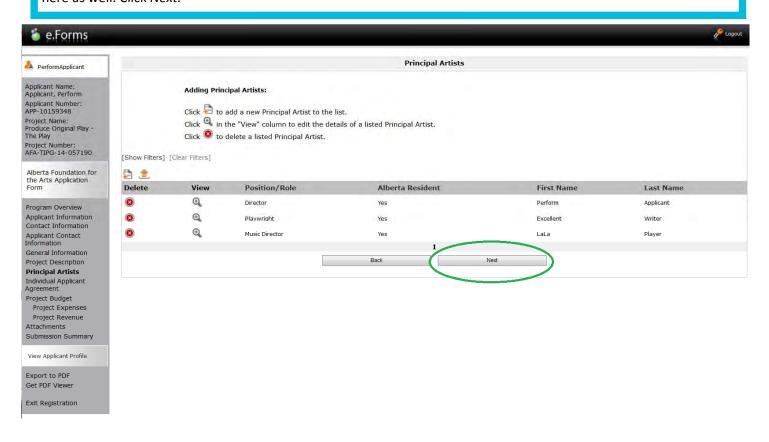
Step 14: on this page you need to designate yourself as the artist of your project by clicking + icon. If you are part of an ensemble, add all other key creative artists by clicking the + icon each time.



Step 15: this is the form that appears after clicking on the + icon described above. Depending on your project, click Save & Add Another or Save and Back to List.



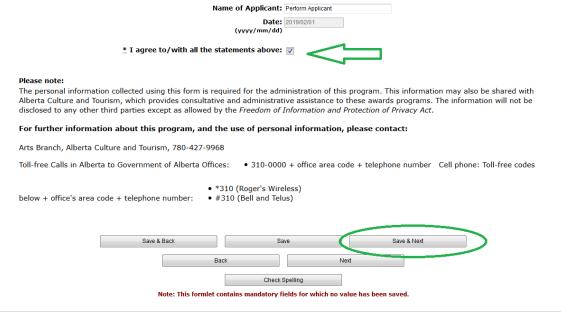
Step 16: this is what the screen looks like after you add yourself as an artist. If you add others they will be listed here as well. Click *Next*.



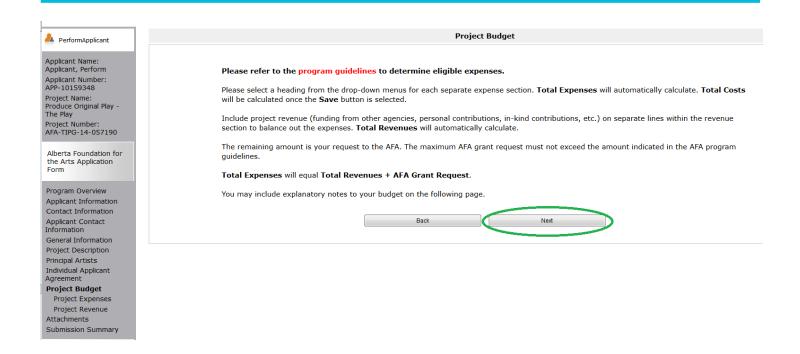
Step 17: Read the **Individual Applicant Agreement** in its entirety and click the box marked with an asterisk. Click *Save & Next*.

- 15. This Agreement may not be assigned by the Applicant.
- 16. The Applicant will recognize the source of the Grant as required by the Guidelines.

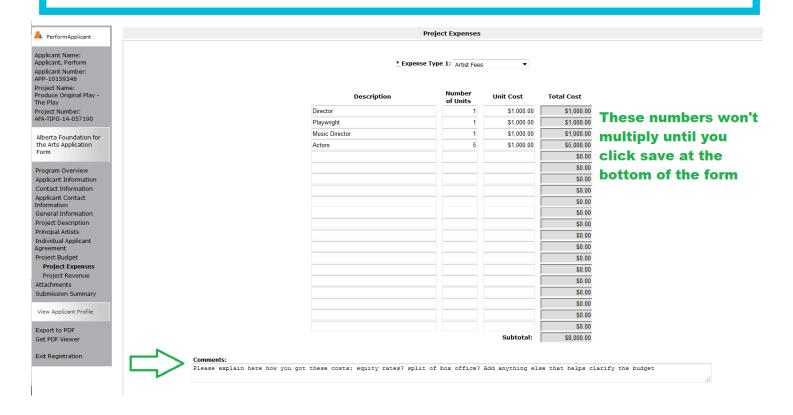
The Applicant represents and warrants that the person signing is duly authorized to make the Application and is legally sufficient to bind the Applicant to the Agreement.



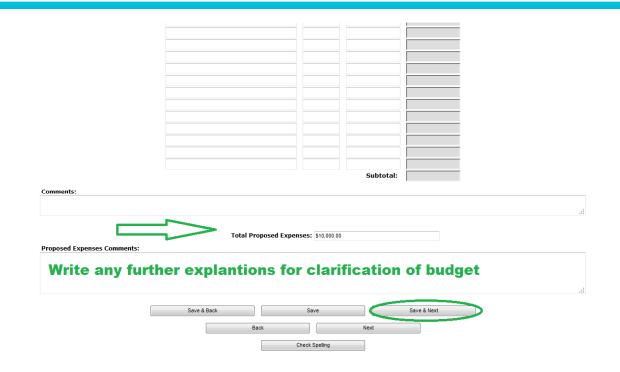
Step 18: the Project Budget page explains the next two screens. Read through and click Next.



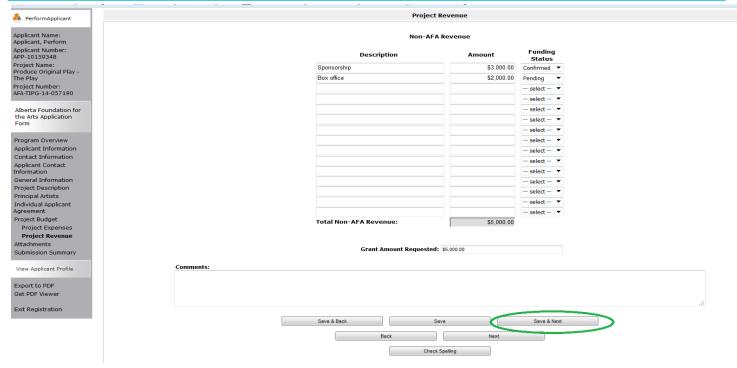
Step 19: on the **Project Expenses** page there are four opportunities to choose an expense type from the dropdown menus and input details. There is also a comments box after each expense type to further clarify if necessary,



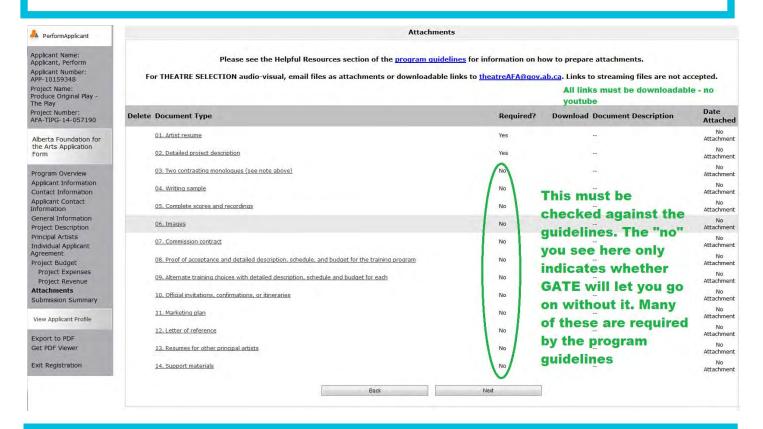
Step 20: still on the **Project Expenses** page, the screen shot below shows the lower part of the page and the Total Proposed Expenses box. This automatically fills in when you click *Save*. There is also a larger Proposed Expenses Comments box if you have more details to share about your budget. When you are finished with your budget expenses make sure you save and click *Next*.



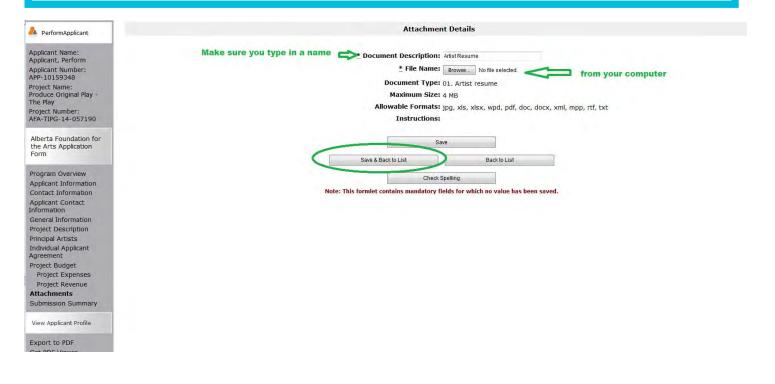
Step 21: on the **Project Revenue** page input any revenue you may have toward the project. Indicate if the funds are confirmed or pending from the dropdown box under Funding Status. There is also a comment box you can use. When you slick *Save*, the Grant Amount Requested box automatically fills in. Click Save & *Next* when you are finished.



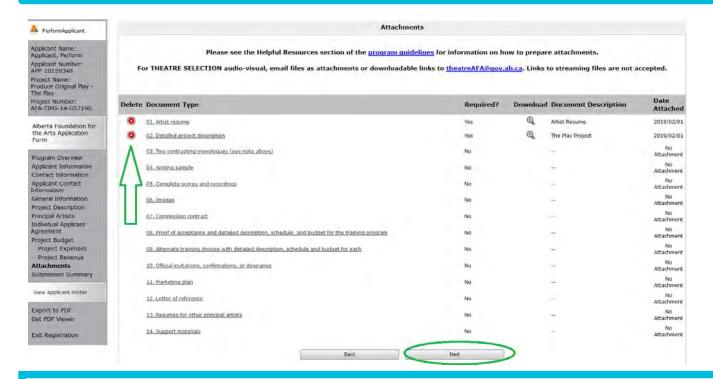
Step 22: on the **Attachments** page click on the underlined document type to upload the requested document. You must upload information for any lines listed *Yes* for required documents.



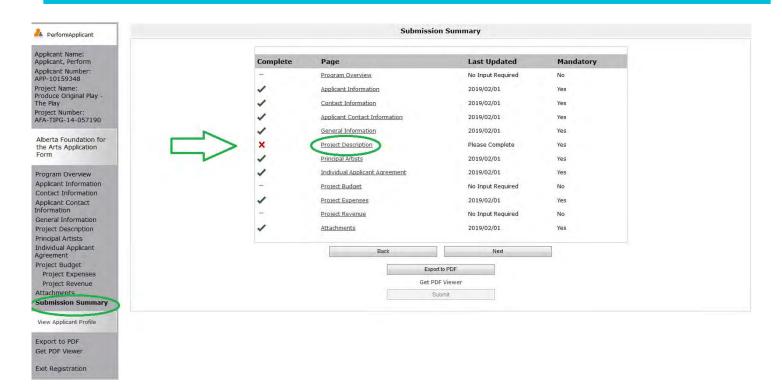
Step 23: when you click on a page you land on **Attachment Details**. Fill in the document description box and click on *Browse* to upload the document from your own files. Click on *Save & Back to List* to upload the remaining mandatory items by clicking on the next document type and repeating. Add any other material if relevant to your application.



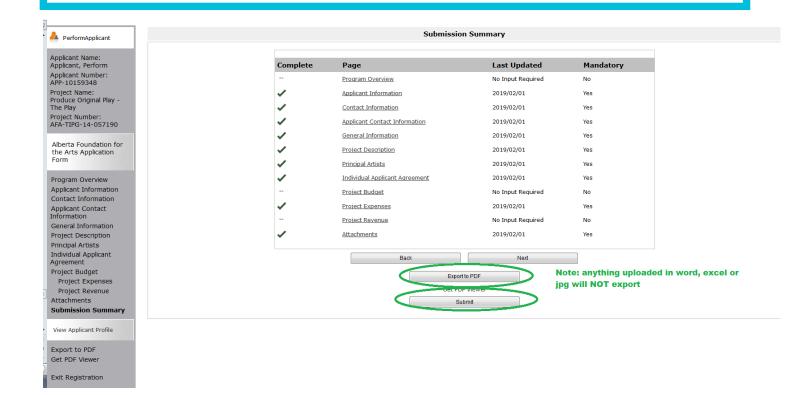
Step 24: When all attachments are uploaded this is what the screen looks like. You can delete a document if you have uploaded it in error by clicking on You can also view the file you uploaded by clicking When you are finished click *Next*.



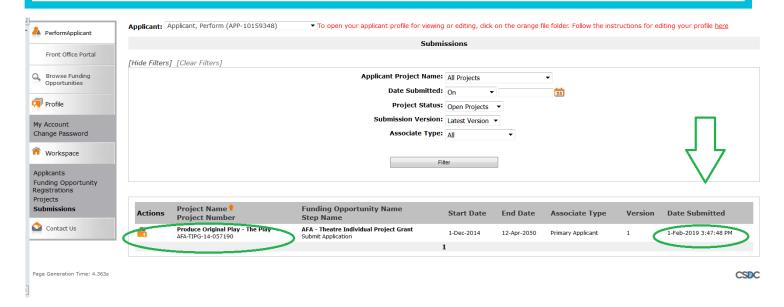
Step 25: this last page, *Submission Summary*, summarizes all the previous pages that you completed. If, for some reason, you missed an item on a previous page, you will see a red X beside the page as per sample below. Click on the underlined page beside the X, complete the page, and save. Go directly to the *Submission Summary* page by clicking *Submission Summary* in the grey menu to the left. Repeat for every red X until you see a green ✓ beside every page.



Step 26: Now, and only with all green \checkmark , you can hit *Submit*. **But, before you do that**, you can print out a paper copy of your submission if you wish. Just click on *Export to PDF*. Then, go back and click *Submit*.



Step 27: After submitting, the screen reverts to *Submissions* where you will see your application was submitted successfully with a project number, time and date. You will receive an e-mail confirming your submission has been received, plus you will continue to receive e-mails as your application is processed. **Congratulations on submitting your application!**



How to resume where you left off working on your application in GATE

Step 1: log on to GATE https://gate.alberta.ca/gate/frontOffice.jsf. If you are prompted to change your password, please complete the steps outlined, and save your new password in a safe place.



The system may be used to submit applications and reporting information for the following Alberta Human Services programs:

• Family & Community Safety Program grant - http://humanservices.alberta.ca/abuse-bullying

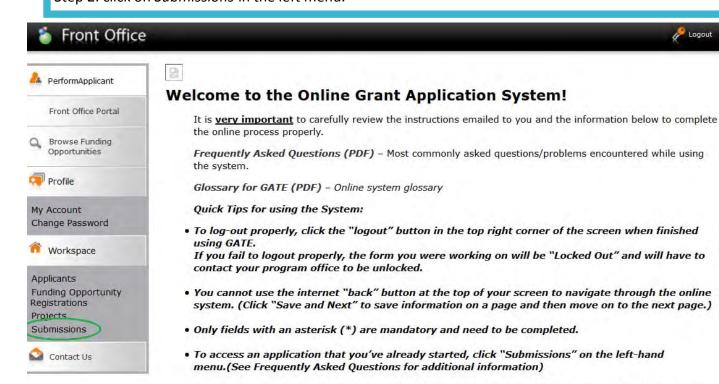
The system maybe expanded to include other grants programs in the future.

· Podium Alberta - http://albertasport.ca/grant-funding-programs/podium-alberta

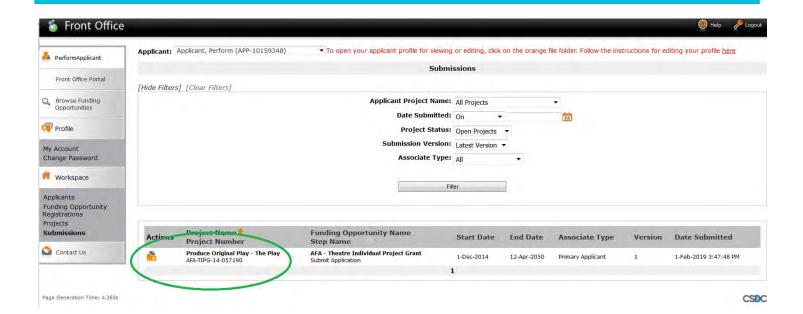
Please note this system cannot be used to submit applications or final reports for the Community Initiatives Program and Community Facility Enhancement Program.

Cogout

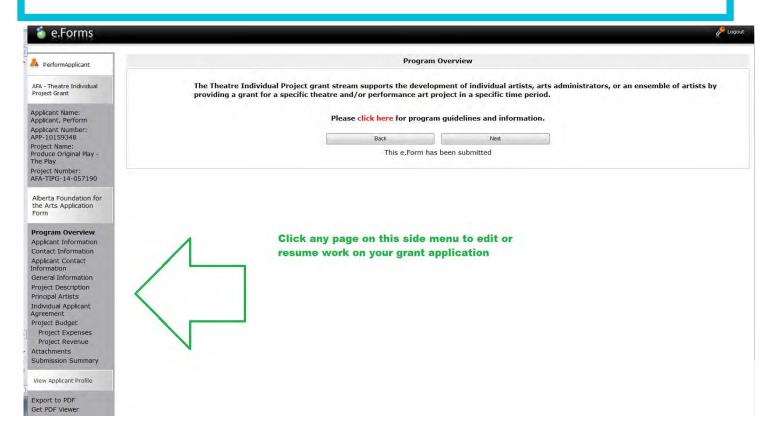
Step 2: click on Submissions in the left menu.



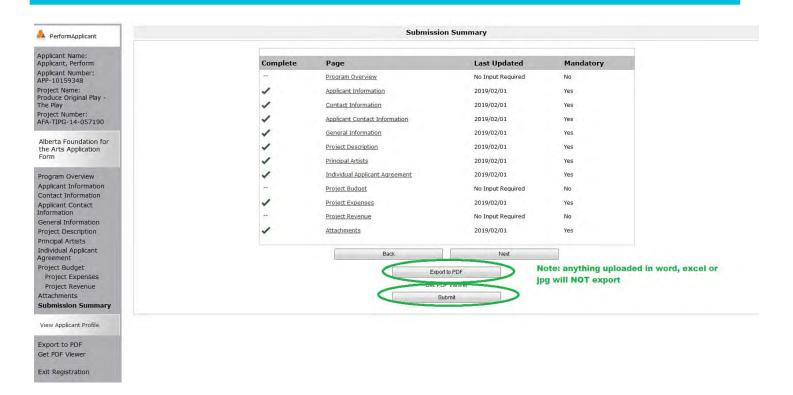
Step 3: find your project name and number and click on the orange file folder to the left.



Step 4: click on any page at the left (e.g. Project Description, Attachments) to resume working on your application. Remember to save each page before moving on.



Step 5: when you have all green ✓, you can hit *Submit*. **Remember**, you can print out a paper copy of your submission if you wish. Just click on *Export to PDF*. Then, go back and click *Submit*.



Step 6: After submitting, the screen reverts to *Submissions* where you originally found your folder. You know your project was submitted successfully because the time and date is now added. You will receive an e-mail confirming your application has been received, plus you will continue to receive e-mails as your application is processed.

Congratulations on submitting your application!

