

State of Indiana eCivis Grants Network User Guide

Reports August 2024

Contents

Purpose	2
Section 1 – Recommended Reports	2
Section 2 – Generating Reports in eCivis Grants Network	3
Section 3 – Report Builder (Custom Reports)	15
Section 4 – Saved Reports	24
Conclusion	25
Definitions	26

Purpose

The purpose of this guide is to provide instructions to Agency eCivis users in navigating and utilizing the **Reports** feature in eCivis Grants Network. Access to the Reports feature, as well as the number of available departments or information in reports, will depend on an Agency eCivis user's level of access, as defined in <u>State of Indiana eCivis Grants Network</u> <u>Policy: User Management</u>.

Section 1 – Recommended Reports

Listed below are reports recommended by SBA to aid Agency eCivis users with managing their grant within the eCivis Grants Network. Each of the bolded titles link to additional guidance within this Reports User Guide.

Research Activity Report: This report will provide data about Agency eCivis users and the actions performed in their eCivis Grants Network accounts. This report can be used to track User Management, including logins, views by Department, and a date range.

<u>NOTE</u>: Agency eCivis users are unable to see data for peers at the same Role level, outlined in <u>State of Indiana eCivis Grants Network Policy: User Management</u>.

<u>Grant Conflict Report</u>: This report will provide grant conflicts more than one eCivis project is assigned to the same grant opportunity or Organization Funding. All State Match eCivis Projects and Substate Transfer eCivis Projects will result in a conflict. That is an expected result; the intention of this result is to ensure agencies are not applying for the *same* grant opportunity.

<u>NOTE</u>: Moving an eCivis Department to the right will *Exclude* it from the search criteria.

Select the departments to exclude from this repor	te
Included Departments	Excluded Departments
100 - ISP - Commercial Vehicle Enforcement Division 100 - ISP - Criminal Intelligence Division 100 - ISP - Criminal Justice Data Division 100 - ISP - Drug Enforcement Section	

Activity Reports: The four (4) available Activity Reports allow agencies to see the status of eCivis Projects through the Grants Lifecycle: Apps Submitted, Closed Projects, Grants Awarded, and Grants Closeout.

Tasks Report: This report allows Agency eCivis users to pull a report showing tasks in eCivis Grants Network projects. This is useful for viewing the status of all pending and/or completed tasks for projects.

<u>Grants Report Builder</u>: The Grants Report Builder gives users the ability to generate custom reports with the exact data you need to meet your reporting and auditing needs.

Section 2 – Generating Reports in eCivis Grants Network

eCivis Grants Network can generate useful reports for Agency eCivis users for a variety of data elements including financial elements, activity elements, eCivis task processes, and usage of the eCivis Grants Network. Agency eCivis user reports will only provide information for eCivis projects their user account has visibility or access. Reports are exportable through Microsoft Excel.

<u>NOTE</u>: Additionally, not all user roles within a department has access to reports. See <u>State of Indiana eCivis Grants Network Policy: User Management</u> for more.

 To access the **Reports** functionality, navigate to the homepage of eCivis Grants Network. Within the homepage, the **Reports** tab will contain all reporting functionalities within eCivis Grants Network.

Home CO	OVID-19 Grant Ma	nagement	Research	Reports	Administration
Tracking 8 Manage Gran	Reporting hts	Insig Best F	Report Builder My Saved Rep Activity Repor Audit Reports	r Horts Its	Enterpri Data and I
			Funding Report	rts	on Items
Applications Submitted	Funding Awarded	Post . Repoi	Goals & Metrie Grant Conflict	cs Report Report	kt 7 Days) Charging and Fueling
13	22	2	Tasks Report Assessment D	Dashboard	Coronavirus State and Fund (
		View Departm	Research Acti	vity	tems ue items.
Applications	Funding	Post	Grant Review	кероп	

 eCivis Grants Network provides multiple pre-designed reports to assist Agency eCivis users with downloading information. Custom-tailored reports can be made through the **Report Builder** functionality. For more information, please see <u>Section 4 – Report</u> <u>Builder (Custom Reports)</u>. This section will highlight some of the pre-designed reports that may be frequently used.

Activity Reports

- Reports under the Activity Reports section provide information regarding projects in the system with links to the eCivis project and grant in eCivis Grants Network. These reports are permission-based, meaning Agency eCivis users can only run reports for their assigned agencies.
- 2) **Apps Submitted**, **Grants Awarded**, and **Grant Closeout** are straightforward reports with search options limited to *Report Start* and *End Date* within the Agency eCivis user's *Department(s)*.
- 3) The Closed Projects report is a unique functionality as this report will display projects that are closed and do not appear on the Project Dashboard. The Closed Projects report is discussed in more detail in the following section.

- a. **Apps Submitted** This report provides a history of all grant applications during the reporting period.
- b. Closed Projects This report provides information based on all projects closed during the reporting period. Further information regarding this report is in the next section.
- c. **Grants Awarded** This report provides information based on all grant applications awarded during the reporting period.
- d. **Grant Closeout** This report provides information based on all grants in the **Grant Closeout Stage** during the reporting period.



Closed Projects

This report allows Agency eCivis users to pull all closed projects within eCivis Grants Network. This is the only avenue in eCivis Grants Network for viewing closed projects as closed projects no longer appear on the dashboard. Please note that closed projects within eCivis Grants Network are a different feature than the **Grant Closeout Stage**.

For more information regarding the Grant Closeout Stage, see <u>State of Indiana eCivis</u> <u>Grants Network User Guide: Grant Closeout in eCivis and PeopleSoft</u>.

1) Under the **Reports** tab on the eCivis Grants Network homepage, hover over **Activity Reports** and click *Closed Projects*.



- 2) The **Activity Report Closed Projects** page will prompt the Agency eCivis user to enter the dates for the **Closed Projects** report.
 - a. **Report Start Date** This field will pull data from the selected start date. A calendar-based option will appear for this field.
 - b. **End Date** This field will pull data until the selected end date. A calendar-based option will appear for this field.

Activity Report - Closed Projects

Information based on all projects <u>closed</u> during the reporting period:

a)	1	<u>(d</u>	
Report Start Date:	07/01/2022	End Date: 07/31/2023	
Select Departments: (CTRL + Click for multiple)	All Departments Department 1	•	

- 3) The Agency eCivis user can filter by **Department**. If the Agency eCivis user has access to multiple departments, multiple departments can be selected by Control-clicking (Ctrl + Left Click) each entry. If the Agency eCivis user only has access to one department, there will only be one option listed. Once an entry is successfully selected, it will be highlighted in gray.
- 4) Click the *Generate Report button* Generate Report and eCivis Grants Network will display the report on the **Closed Projects** screen. To download the report to your computer as an Excel file, click the *Excel document icon*.

				6 4 6 B
Activity Report	t - Closed Projects			1
Information based on all	projects <u>closed</u> during the reporting	period:		
Enter Criteria and Ge	nerate Report			
Report Start Date:	08/06/2022		End Date: 08/05/2023	1991
Select Departments: (CTRL + Click for multiple)	All Departments Agency A Agency B State Budget Agency		1	
Generate Report)				
Closed Project	cts: 1 nds: \$1,000,000.00			
Cash Mat	tch: N/A			
In-Kind Mat	tch: N/A			
Agency A - 0 projects	1			🛨 Open
Agency B - 1 project				🛨 Open

Audit Reports

- 1) Reports under the Audit Reports section provide program and project history information. The following Audit Reports are available:
 - a. **File Library** This report provides all files uploaded to eCivis Grants Network by project and grant. See the *File Library* subsection for more information.
 - b. **Spending Report** This report provides a department-by-department breakdown of spending for each grant.
 - c. **Transaction Report** This report provides a department-by-department breakdown of transactions for each grant.
 - d. **Not Awarded Report** This report provides a department-by-department breakdown of applications that were not awarded.
 - e. **Budget Revision Report** N/A: This report can provide a record of budget revisions, but State of Indiana is not utilizing budgets within Grantee of eCivis Grants Network.



File Library

This report allows Agency eCivis users to pull a department-by-department breakdown of all grants included in the selected departments, a complete list of grant stages, and corresponding files associated with each grant stage.

1) Under the **Reports** tab on the eCivis Grants Network homepage, hover over **Audit Reports** and click *File Library*.

Home	COVID-19 Gra	ant Management	Research	Reports	Administration
Tracking Manage Gr	& Reporting	g Insig Best F	Report Builder My Saved Report	orts Is	Enterpris Data and E
_	File Library		Audit Reports	1	
	Spending Re	port	Funding Repor	ts	on Items
Applications	Transaction	Report	Goals & Metric	s Report	ct 7 Days)
Submitted	Not Awarded	d Report	Grant Conflict	Report	Charging and Fueling I
13	Budget Revi	sion Report	Tasks Report		Discreti Coronavirus State and Fund (

2) An Agency eCivis user can filter by **Department**. If the Agency eCivis user has access to multiple departments, multiple departments can be selected by Control-clicking (Ctrl) each entry. If the Agency eCivis user only has access to one department, there will only be one option listed. Once an entry is successfully selected, the entry will be highlighted in gray.

Report Criteria		
Departments	Project Status	Projects
All Departments Department 1	All Open Closed	All Projects 23(g) State Plan Grants - FFY 2024 988 Improvement Charging and Fueling Infrastructure (CFI) Discretionary Gr CMHI

 Following the Departments field is an option for Project Status and Projects. These fields will apply parameters for open and/or closed projects and specify from which projects to pull.

Report Criteria		
Departments	Project Status	Projects
All Departments - Department 1	All Open Closed	All Projects 23(g) State Plan Grants - FFY 2024 988 Improvement Charging and Fueling Infrastructure (CFI) Discretionary Gr CMHI

4) Next, the Agency eCivis user can filter by project Grants and Stages.

Departments	Project Status	Projects	
All Departments - Department 1	All Open Closed	 All Projects 23(g) State Plan Gran 988 Improvement Charging and Fueling CMHI 	is - FFY 2024 Infrastructure (CFI) Discretionary Gr
Grants		Stages	
US15685 Rural Health Care Coordination Program - FY 2023 US17058A Charging and Fueling Infrastructure (CFI) Discretionary Grant Pro US17341 Coronavirus State and Local Fiscal Recovery Fund (CSFRF/CLFRF US17743 Conperative Agreements for States and Territories to Build Local 98	gram (Part A): Commu -) - FY 2021 8 Capacity (988 State	All Stages	

- 5) Then, the dates for the report can be entered.
 - a. **Report Start Date** This field will download data beginning with the selected start date. A calendar-based option will appear for this field.
 - b. **End Date** This field will download data until the selected end date. A calendarbased option will appear for this field.
 - c. Filter By Date Type
 - Stage Completed Date
 - File Saved Date

Report Criteria			
Departments		Project Status	Projects
All Departments Department 1	-	All Open Closed	All Projects 23(g) State Plan Grants - FFY 2024 988 Improvement Charging and Fueling Infrastructure (CFI) Discretionary Gr CMHI
Grants			Stages
US15685 Rural Health Care Coordination Progra US17058A Charging and Fueling Infrastructure (US17341 Coronavirus State and Local Fiscal Re- US17743 Cooperative Agreements for States and US18162 Preventing Youth Overdose: Treatment	m - FY 2023 CFI) Discretionary Grant Prog covery Fund (CSFRF/CLFRF I Territories to Build Local 98 , Recovery, Education, Aware	rram (Part A): Commu) - FY 2021 3 Capacity (988 State eness, and Training (F-	All Stages
Report Start Date (a)	End Date b)	Filter By	Date Type C)
3		E Stage File Sa	Completed Date

- 6) Lastly there are two checkboxes labeled **Project Documents Only** and **Show Only Projects and Grants with Files**.
 - a. **Project Documents Only** Displays documents uploaded for the project not the grant.
 - b. Show Only Projects and Grants with File Displays documents uploaded for a project in relation to its specific grant and the tasks and/or Grant Stage.
 - c. Checking both boxes will report on Project Documents Only.

Departmento	Project Status	4	Projects
All Departments Department 1	All Open Closed		All Projects 23(g) State Plan Grants - FFY 2024 988 Improvement Charging and Fueling Infrastructure (CFI) Discretionary G CMHI
Grants		Stages	5
UNICONCER III NO O P	on Brogram EV 2022	- All S	tages
US1565 Rural Health Care Coordinati US17058A Charging and Fueling Infras US17341 Coronavirus State and Local US17743 Cooperative Agreements for US18162 Preventing Youth Overdose: Report Start Date	In Friggiant – Fr 2023 Tructure (CFI) Discretionary Grant Program (Part A): 4 Fiscal Recovery Fund (CSFRF/CLFRF) – FY 2021 States and Territories to Build Local 988 Capacity (98 Freatment, Recovery, Education, Awareness, and Tra End Date	Commu 8 State ining (F- Filter By Date Ty;	pe
US15bb5 Kural Health Care Coordinati US17058A Charging and Fueling Infras US17341 Coronavirus State and Local US17743 Cooperative Agreements for US18162 Preventing Youth Overdose: Report Start Date	End Date	Commu 8 State ining (F - Filter By Date Typ Stage Compl File Saved D:	pe eted Date ate

7) Check those that apply then click the *Generate Report button* Generate Report and eCivis Grants Network will display the report by Department and Grantee Project. Below each listing there will be the files associated with the Grantee Project.

nmary	
Project Documents:	3
Under Consideration:	9
Will Not Pursue:	0
Will Not Apply:	1
Application Preparation:	8
Application Submitted:	65
Not Awarded:	0
Award Projected:	0
Grant Awarded:	62
Reports:	0
Funding Allocated:	1
Grant Closed:	0

Department 1

Rural Health Care Coord	lination Program - FFY2	3			😑 Minimize
US15685 Rural Health Care Coo	ordination Program - FY 2023				
Stage	Completed On	Manage Files	Download Files	Saved On	Saved By
Application Submitted	04/27/2023				
			Application (11.7 Kb)	04/27/2023	D. FSSA

Funding Reports

1) Reports under the **Funding Reports** section provide financial comparisons among projects. The available funding reports are listed, below.



 Allocations – This report provides details on all funds available for allocation, and which funds have been allocated to which projects during a defined date range. Different from pass-through funding.

<u>NOTE</u>: This report will not display any data, as the Allocations functionality is not currently being used by the State of Indiana.

- b. **Annual Comparison** This report provides an annual comparison of awarded, projected, and not awarded grants and funds between/among departments.
- c. **Comp vs. Non-Comp** This report provides information regarding competitive and non-competitive grants that were and were not awarded.
- d. **[eCivis] Funding Source** This report provides a breakdown of organizations (funding agencies) that solicited grant programs that funded projects in the selected department(s).
- e. **Match vs. Award** This report provides a look into the cash and in-kind matches for awarded and projected funds.
- f. **Projected vs. Awarded** This report provides information regarding the projected and awarded funds, and their cash and in-kind match amounts, for the selected parameters.
- g. Win Rate This report provides information regarding the win rate (percentage of awarded applications compared to submitted applications) for the selected parameters.

Miscellaneous Reports

- There are other pre-designed reports provided by eCivis Grants Network that are not under the Activity, Audit, or Funding titles. These miscellaneous reports provide information regarding grant activities and Agency eCivis user management. The following miscellaneous reports are available:
 - a. **Goals & Metrics Report** This report will provide details on goals and metrics in eCivis Grants Network projects.
 - b. **Grant Conflict Report** This report will provide grant conflicts between/among departments to which the Agency eCivis user has access.
 - c. **Tasks Report** This report will display tasks in eCivis Grants Network projects. See the *Tasks Report* subsection for more information.
 - d. **Assessment Dashboard** This report will display a dashboard that provides an overarching view of the pending tasks left to be completed.
 - e. **Research Activity** This report will provide data about Agency eCivis users, and the actions performed in their eCivis Grants Network accounts.
 - f. **Grant Review Report** This report will provide which Agency eCivis users have shared grants with other Agency eCivis users, and the status of the review of those shared grants.



Tasks Report

This report allows Agency eCivis users to pull a report showing tasks in eCivis Grants Network projects. This is useful for viewing all pending and/or completed tasks for projects.

1) Under the **Reports** tab on the eCivis Grants Network homepage, click *Tasks Report*.



2) The Tasks Report page will prompt the Agency eCivis user to enter the report parameters.

First, the Agency eCivis user will enter the dates for the Tasks Report.

- a. **Start Date** This field will pull data from the selected start date. A calendar-based option will appear for this field.
- b. **End Date** This field will pull data until the selected end date. A calendar-based option will appear for this field.
- c. Filter By Date Type This field will select the type of date used for the start and end dates.
 - Assigned Date
 - Completed Date
 - Due Date

Start Date: a.		End Date: b.		Filter By Date Type: 🥴
08/05/2022		08/05/2023		Due Date 🗸
Department:	All Departments Alpha Bravo Charlie Delta			
Project Lead:	All Project Lead Agency eCivis L	s ô Jser	Project:	All Projects US17632 Coronavirus Capital Projects Fun Ryan Animal Rescue Foundation (RARF): f

3) The Agency eCivis user can filter by **Department**. If the Agency eCivis user has access to multiple departments, multiple departments can be selected by Control-clicking (Ctrl) each entry. If the Agency eCivis user only has access to one department, there will only be one option listed. Once an entry is successfully selected, the entry will be highlighted in gray.

Start Date:		End Date:	Filter By Date Type:	
08/05/2022		08/05/2023	Due Date	~
			1 803 FMR	
epartment:	All Department	S	8	

4) The Agency eCivis user can filter by **Project Lead** and **Project**. Like **Department**, multiple Project Leads and projects can be selected by control-clicking.

Start Date:		End Date:	Filter By Date Type:
08/05/2022		08/05/2023	Due Date 🗸
Department:	All Department Alpha Bravo Charlie Delta	S	Ĵ.

- 5) Lastly, the **Task Type** for the report will be selected.
 - a. For **Task Type**, the following selections can be made from a dropdown menu. Each selection describes a type of task.
 - All Tasks This pulls all task types in eCivis Grants Network Grantee projects.
 - **Application Due** This task relates to the stated date in the eCivis Grants Network for applying to a grant opportunity.
 - Scheduled Report This task relates to all scheduled reporting requirements created in eCivis Grants Network Grantee projects.
 - **Approval** This task relates to any Grantee project tasks that required an approval in eCivis Grants Network.
 - **Miscellaneous** This task relates to tasks created through the **Miscellaneous Task** feature. Those tasks created that were not a "Scheduled Report."
 - **Contract Close** This task relates to the **Contract Close** date of the eCivis Grants Network Grantee projects.
 - **Override** This relates to required tasks that were overridden by an Agency eCivis user with appropriate permissions.

b. There are two checkboxes labeled **Pending** and **Completed**. Checking these boxes will pull either pending and/or completed tasks into the report.



7) Click the *Generate Report button* and eCivis Grants Network will automatically download the report to the Agency eCivis user's computer.

Section 3 – Report Builder (Custom Reports)

1) To create a custom report, the Agency eCivis user will navigate to the **Reports** tab. In the **Reports** tab, click the *Report Builder* option.



2) **STEP 1 – Select the departments to include in the report.**

If the Agency eCivis user has access to multiple departments, multiple departments can be selected by Control-clicking (Ctrl) each entry. If the Agency eCivis user only has access to one department, there will only be one option listed. Furthermore, if the Agency eCivis user has not yet been assigned to any projects, no departments or projects will be listed. Departments can be selected by interacting with the left-hand box. Clicking on the > button will cause the selected department to appear in the right-hand box. All agencies listed in the right-hand box will appear in the report.

- a. Places all options in the right-hand box.
- b. Places only the selected option(s) in the right-hand box.
- c. c. e. Removes a selection from the right-hand box.
- d. <u>•</u> Removes all selected options from the right-hand box.

STEP 1 - Select the Departments to include in	the Report 💮	
Select at least one department to include in the report. Departments *		
Department 1		

3) **STEP 2 – Select the grants to include in the report**.

There will be five fields to enter.

- a. Report Start Date This field will pull data from a start date selected from a calendar.
- b. Report End Date This field will pull data until an end date selected from a calendar.
- c. Filter By Date Type This field selects the type of data for the start and end dates.
 - Grant Added Date
 - Application Submitted Date
 - Grant Awarded Date
 - Contract Start Date
 - Contract End Date
 - Grant Closed Date
- d. **Grant Type** This field filters the report by origin of the grant funds. Multiple selections can be made by following the same process as in <u>Step 1</u> of the report builder.
 - County/Regional
 - Federal
 - Foundation
 - Other
 - State
 - Tribal
- e. **Grant Stage** This field filters the report by the stage of the grant in the Grantee eCivis project. Multiple selections can be made, as described in <u>Step 1</u>.
 - Under Consideration
 - Will Not Apply
 - Will Not Pursue
 - Award Projected
 - Application Preparation
 - Application Submitted
 - Not Awarded
 - Implementation
 - Grant Awarded
 - Funding Allocated
 - Grant Closeout

STEP 2 - Select the Grants to I	nclude in the Report 😡				
Select at least one item in any of the matching the type of date to be used Report Start Date (a)	e lists in this section, with the dates and date d. Report End Date (b)	types being optional. If a Dat	te type is selected, th	ne grant stage list will be update	d to only allow a stage
Open Grants O Closed Gran Grant Type* d)	ts O All Grants (Open & Closed)	Grant Stage*	~)	Clear Filter	
County/Regional Federal Foundation Other State Tribal		Under Cons Will Not Apy Will Not Pur Award Proje Application Application Not Awarde Implementa	sideration ply rsue ected Preparation Submitted id ition	35 35 4 4	

4) STEP 3 – Select the data to include in the report.

This allows Agency eCivis users to select which data elements appear in the report as Column headers. There are five datapoint categories from which to select. The selections and the columns can be re-ordered by clicking on the *Up and Down Arrow*

buttons and . Multiple selections can be made by following the same process as in <u>STEP 1</u> of the report builder.

- a. **Grant Identification Data** Information that describes the funding opportunity and its project association.
 - NOTE: "Project Assigned" returns eCivis Project Titles.
- b. Application Data Information regarding the application submitted.
- c. Award Data Information about grants awarded.
- d. **Task and Report Data** Information about the number and status of tasks and reports assigned to grants.
- e. **Budget Data** Information regarding expenditures, cost shares, indirect/direct costs, and balances associated with grants.

STEP 3 - Select the Data to Include in the Report 💿					
Select at least one data point from any of the lists in t Data Points*	his section.				
1. Choose from Grant Identification Data (a)	Grant Title GN Grant Code		-		
2. Choose from Application Data	Funding Agency Funding Office				
3. Choose from Award Data 🥑	CFDA/ALN Grant Contact				
4. Choose from Task and Report Data d)	Funding Opportunity Number Federal Award ID Number				
5. Choose from Budget Data (e)	State ID Grant Type				

The following two reports using the **Report Builder** functionality may be of interest to the Agency eCivis user as they are related to the State Budget Agency (SBA) pursuance approval (Application Preparation and Application Submitted Report) and Funding Source Number request (Grant Awarded and Implementation Report).

Application Preparation and Application Submitted Report

1) To create a custom report, the Agency eCivis user will navigate to the **Reports** tab. In the **Reports** tab, click the *Report Builder* option.



2) STEP 1 – Select the departments to include in the report.

If the Agency eCivis user has access to multiple departments, multiple departments can be selected by control-clicking each entry. If the Agency eCivis user only has access to one department, there will only be one option listed. Furthermore, if the Agency eCivis user has not yet been assigned to any projects, no departments or projects will be listed.

Departments can be selected by interacting with the left-hand box. Clicking on the

right arrow button will cause the selected department to appear in the right-hand box. All agencies listed in the right-hand box will appear in the report.

- a. Multiple Places all options in the right-hand box.
- b. Places only the selected option(s) in the right-hand box.
- c. c. e.
- d. <u>Market Removes all selected options from the right-hand box.</u>

STEP 1 - Select the Departments to include in the Report 🕥				
Select at least one department to include in	the report.			
Departments *				
Department 1		*		

- 3) **STEP 2 Select the grants to include in the report**. There will be five fields to enter. Move all of them over to the right-hand box.
 - a. Grant Type This field filters the report by origin of the grant funds. Multiple selections can be made by following the same process as in STEP 1 of the report builder.
 - b. Grant Stage This field filters the report by the stage of the grant in the eCivis project. Multiple selections can be made by following the same process as in STEP 1 of the report builder. Move Application Preparation and Application Submitted over to the right-hand box.

Select at least one item in any natching the type of date to b	of the lists in this section, with the d e used.	lates and date types bei	ng optional. If a Date type is selected, t	he grant stage li	st will be updated to only allow a
Report Start Date	Report End Date	Filte	r By Date Type		
			~	Clear Filter	
			Grant Stage* b)		
rant Type* (a)			crain crago	-	
County/Regional		1	Under Consideration Will Not Apply		Application Preparation
rant Type* (2) County/Regional Federal Foundation		0	Under Consideration Will Not Apply Will Not Pursue	1	Application Preparation Application Submitted
Trant Type* (2) County/Regional Federal Foundation Other		ĺ	Under Consideration Will Not Apply Will Not Pursue Award Projected	*	Application Preparation Application Submitted
Grant Type* (2) County/Regional Federal Foundation Other State Tribal	*		Under Consideration Will Not Apply Will Not Pursue Award Projected Not Awarded Implementation	*	Application Preparation Application Submitted
Grant Type* (2) County/Regional Federal Foundation Other State Tribal	*		Under Consideration Will Not Apply Will Not Pursue Award Projected Not Awarded Implementation Grant Awarded		Application Preparation Application Submitted

4) STEP 3 – Select the data to include in the report.

This allows Agency eCivis users to select which data elements appear in the report. There are five datapoint categories from which to select. Multiple selections can be made by following the same process as in **STEP 1** of the report builder.

For this report, the Agency eCivis user will focus on the first two datapoint categories:

- a. **Grant Identification Data** Information that describes the funding opportunity and its project association.
- b. **Application Data** Information regarding the application submitted.

STEP 3 - Select the Data to Include in the Report 💿						
Select at least one data point from any of the lists Data Points*	in this section.					
1. Choose from Grant Identification Data	Application Required	*				
2. Choose from Application Data	Assigned To Application Submitted Date		-			
3. Choose from Award Data	Submitted By Last Application Resubmitted Date					
4. Choose from Task and Report Data	Resubmitted By Projected Amount					
5. Choose from Budget Data	Match Type Projected Match - Cash	*				

5) Move the following datapoints over from the Grant Identification Data and Application Data (this is the suggested order, but an Agency eCivis user can change the report display order of the datapoints by using the up/down arrows to the right of the right-hand box):

Data Point	Field
1. Grant Identification Data	Department Assigned
1. Grant Identification Data	Project Assigned (eCivis Project Title)
1. Grant Identification Data	Current Stage
2. Application Data	Application Due Date
2. Application Data	Application Submitted Date
1. Grant Identification Data	Lead of Assigned Project
1. Grant Identification Data	Lead Email Address
1. Grant Identification Data	Grant Title
1. Grant Identification Data	Grant Type
1. Grant Identification Data	Funding Agency
1. Grant Identification Data	Assistance Listing (Formerly CFDA)
1. Grant Identification Data	Funding Opportunity Number
1. Grant Identification Data	Project Summary
1. Grant Identification Data	Project Start Date
1. Grant Identification Data	Project End Date
1. Grant Identification Data	Grant Tags
2. Application Data	Projected Amount
1. Grant Identification Data	Match Required
2. Application Data	Match Type
2. Application Data	Projected Match - Cash
2. Application Data	Projected Match - In-Kind

STEP 3 - Select the Data to Include in the Report 💿 Select at least one data point from any of the lists in this section. Data Points* GN Grant Code Department Assigned 1. Choose from Grant Identification Data >> * Funding Office Project Assigned CFDA/ALN Current Stage 2. Choose from Application Data ٠. ٠ Grant Contact Application Due Date Funding Opportunity Number Application Submitted Date 3. Choose from Award Data ٠ Federal Award ID Number Lead of Assigned Project State ID 44 Lead Email Address 4. Choose from Task and Report Data Other Grant Type Grant Title Grant Tags Grant Type 5. Choose from Budget Data Match Required Funding Agence

 For guidance on how to save a custom report in Report Builder, see <u>Section 5 –</u> <u>Saved Reports</u>.

Grant Award and Implementation Report

1) To create a custom report, the Agency eCivis user will navigate to the **Reports** tab. In the **Reports** tab, click the *Report Builder* option.



2) STEP 1 – Select the departments to include in the report.

If the Agency eCivis user has access to multiple departments, multiple departments can be selected by control-clicking each entry. If the Agency eCivis user only has access to one department, there will only be one option listed. Departments can be selected by interacting with the left-hand box.

Clicking on the *right arrow button* is will cause the selected department to appear in the right-hand box. All agencies listed in the right-hand box will appear in the report.

- a. Multiple Places all options in the right-hand box.
- b. Places only the selected option(s) in the right-hand box.
- c. c. e. Removes a selection from the right-hand box.
- d. <u>-</u> Removes all selected options from the right-hand box.

STEP 1 - Select the Departments to include in the Report 💿				
Select at least one department to include in the re	port.			
Department 1		-		

- 3) STEP 2 Select the grants to include in the report.
 - a. Grant Type This field filters the report by origin of the grant funds. Multiple selections can be made by following the same process as in STEP 1 of the report builder.
 - County/Regional
 - Federal
 - Foundation
 - Other
 - State
 - Tribal
 - b. **Grant Stage** This field filters the report by the stage of the grant in the eCivis project. Multiple selections can be made by following the same process as in

STEP 1 of the report builder. Move *Grant Awarded* and *Implementation* over to the right-hand box.

Select at least one item in any natching the type of date to b	of the lists in this section, with the da e used.	ates and date types be	ing optional. If a Date type is selected, the	e grant stage list will be updated t	to only allow a
eport Start Date	Report End Date	Filt	er By Date Type		
			~	Clear Filter	
rent Tunot (2)			Creat Stage* (b)		
rant Type* (2) County/Regional Federal Foundation			Grant Stage* b) Under Consideration Will Not Apply Will Not Pursue	Grant Awarded Implementation]
rant Type* (2) County/Regional Federal Foundation Other State))) ()		Grant Stage* b) Under Consideration Will Not Apply Will Not Pursue Award Projected Not Awarded	Grant Awarded Implementation]

4) STEP 3 – Select the data to include in the report.

This allows Agency eCivis users to select which data elements appear in the report. There are five datapoint categories from which to select. Multiple selections can be made by following the same process as in **STEP 1** of the report builder.

For this report, the Agency eCivis user will focus on the first two datapoint categories:

- a. **Grant Identification Data** Information that describes the funding opportunity and its project association.
- b. Award Data Information regarding the application submitted.

STEP 3 - Select the Data to Include in the Report 💿				
Select at least one data point from any of the lists Data Points*	in this section.			
1. Choose from Grant Identification Data	GN Grant Code Funding Office			
2. Choose from Application Data	CFDA/ALN Grant Contact		-	
3. Choose from Award Data	Funding Opportunity Number Federal Award ID Number	•		
4. Choose from Task and Report Data	State ID Other Grant Type			
5. Choose from Budget Data	Grant Tags Match Reguired	*		

5) Move the following datapoints over from the Grant Identification Data and Application Data (this is the suggested order but an Agency eCivis user can change the report display order of the datapoints by using the up/down arrows to the right of the right-hand box):

Data Point	Field
1. Grant Identification Data	Department Assigned
1. Grant Identification Data	Project Assigned (eCivis Project Title)
1. Grant Identification Data	Current Stage
3. Award Data	Award Date
1. Grant Identification Data	Lead of Assigned Project
1. Grant Identification Data	Lead Email Address
1. Grant Identification Data	Grant Title
1. Grant Identification Data	Grant Type
1. Grant Identification Data	Funding Agency
1. Grant Identification Data	Assistance Listing (Formerly CFDA)
1. Grant Identification Data	Project Start Date
1. Grant Identification Data	Project End Date
3. Award Data	Contract Start
3. Award Data	Contract Close
1. Grant Identification Data	Grant Tags
3. Award Data	Award Type
3. Award Data	Award Amount
1. Grant Identification Data	Match Required
3. Award Data	Match Amount - Cash
3. Award Data	Match Amount - In-Kind
3. Award Data	UEI
3. Award Data	Grantor Contract Number
1. Grant Identification Data	Internal Grant ID

elect at least one data point from any of the lists ta Points*	in this section.			
. Choose from Grant Identification Data	GN Grant Code Funding Office		Department Assigned Project Assigned	-
. Choose from Application Data	Grant Contact Funding Opportunity Number		Current Stage	
Choose from Award Data	Federal Award ID Number State ID	•	Lead of Assigned Project	
Choose from Task and Report Data	Other Grant Type Grant Tags		Grant Title	
Choose from Budget Data	Match Required Project Summary		Funding Agency	

6) For guidance on how to save a custom report in Report Builder, see <u>Section 5 –</u> <u>Saved Reports</u>.

Section 4 – Saved Reports

Custom reports in **Report Builder** can be saved for future use, avoiding the need to re-input the data fields each time the report is replicated.

1) Click the Save Report Settings button Save Report Settings to save a custom report for later use.

ata Points*		
I. Choose from Grant Identification Data	GN Grant Code Funding Agency	
2. Choose from Application Data	Funding Office CFDA/ALN	-
3. Choose from Award Data	Grant Contact Funding Opportunity Number	
4. Choose from Task and Report Data	Federal Award ID Number State ID	
5. Choose from Budget Data	Grant Type Other Grant Type	

 An additional Save Report Settings will appear. Enter the Name of the report and a brief text description in the Description text box. Click the Save button save to save the custom report settings.

Save Report Settings	×	x
Name <mark>*</mark> :		
Description*:		
Save) C	ancel)	

Accessing Saved Reports

Saved reports can be accessed again by visiting the eCivis Grants Network homepage and hovering over the **Reports** tab. From the options provided, click **My Saved Reports**.

Home	COVID-19	Grant Ma	nagement	Research	Reports	Administration
			Insig	Report Builder		
Tracking & Reporting		My Saved Reports		Enterpri		
Manage	Grants		Best	 Activity Report 	ts	Data and t

1) A saved report can be executed by clicking the adjacent *Execute Report icon*, edited by clicking the *Pencil icon*, or deleted by clicking the *Delete icon*.

My Sa	ved Reports		
O Cre	ate New Report		
Saved F	Reports		
Number	Report Name	Last Updated	Actions
1	New Report Test	08/08/2023	

2) Click the *Generate Report button* Generate Report to view the report results in Microsoft Excel.



Conclusion

Utilizing the reporting feature in eCivis Grants Network can assist Agency eCivis users in extracting information from eCivis Grants Network. When utilized, this can give additional insights into the Indiana State Agency's actions in eCivis Grants Network and its compliance with the terms of a grant.

Definitions

Agency eCivis User – A user of eCivis Grants Network. This is a State of Indiana staff person using the system as a Grantee or Grantor. See Grantee and Grantor.

Assistance Listing – Formerly known as the Catalog of Federal Domestic Assistance (CFDA), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA).

Assistance Listing Number (ALN) – A unique number assigned to identify a Federal Assistance Listing, formerly known as the CFDA number. See Assistance Listing.

Catalog of Federal Domestic Assistance (CFDA) Number – Now known as the Assistance Listing or Assistance Listing Number (ALN), it refers to the publicly available listing of Federal assistance programs managed and administered by the General Services Administration (GSA). eCivis will be updating the system to remove CFDA.

Competitive Funding – Funding where the Grantor may select the Grantee(s) from among all eligible Grantees/Applicants; may decide to make or not make an award based on the programmatic, technical, or scientific content of an application; and can decide the amount of funding to be awarded.

Department – Departments built within eCivis Grants Network. A single Indiana State Agency may have one or more departments within eCivis Grants Network representing their divisions, offices, agencies, etc.

eCivis – The software vendor that created eCivis Grants Network (Indiana State Agencies as Grantees/Grantors) and eCivis Portal (Applicants/Subrecipients to Indiana State Agencies' grant programs).

eCivis Project – Project is used in two ways within eCivis Grants Network, Grantee project and Grantor project. See Grantee Project and Grantor Project.

Federal Award Identification Number (FAIN) – The unique identifier within the Federal agency for each financial assistance award.

Funder – See Grantor.

Grantee – Persons or organizations who receive funding from another party. Indiana State Agencies operate in the role of a Grantee when they receive funding from external parties like the Federal government. A Grantee is also referred to as a Subrecipient.

Grantee Project – Indiana State Agencies can manage grants that they pursue from preaward to post-award by creating a project.

Grantor – Persons or organizations that provide grant funding to another party. Indiana State Agencies operate as Grantors when they distribute grant funds to Subrecipients (Grantees). Also, referred to as a Funder.

Grantor Project – A project title is required for each application submitted by an Applicant and an award granted by an Indiana State Agency. The Subrecipient or the Grantor (Indiana State Agency) can edit the project title at any time. The project title is called Project or Project Name in eCivis Grants Network.

Grants Network (GN) – The eCivis name for the software. eCivis also refers to the system as "eCivis," "eCivis Grants Network," or "GN."

Grant Stage – The status of a Grantee project and grant in eCivis Grants Network. There are eleven Grant Stages in eCivis Grants Network. They are:

- Under Consideration the Indiana State Agency is vetting the grant program internally for further pursuance and application.
- Will Not Apply the Indiana State Agency decided to pursue the grant program but eventually did not apply.
- Will Not Pursue following the Indiana State Agency's internal vetting process, the decision was made not to pursue the grant program.
- Award Projected the Funder/Grantor informed the Indiana State Agency that its project was awarded without funding allocated to it.
- Application Preparation the Indiana State Agency is developing its application for submission.
- Application Submitted the Indiana State Agency submitted an application to the grant program.
- Not Awarded the Indiana State Agency received a non-award notification from the Funder/Grantor.
- Implementation post-award when reporting starts on the awarded project and grant.
- Grant Awarded the Indiana State Agency received an award notification with funding for its submitted application.
- Funding Allocated an awarded project and grant provides funding to other Indiana State Agencies through specific functionality in eCivis Grants Network.
- Grant Closeout after Implementation, the process of finalizing the funding received and expended along with submission of any final reports.

Non-Competitive Funding – Funding in which the awarding agency has selected the Recipients and/or the amount of funding through formula, criteria, or non-competitive means.

Project – See Grantee Project.

Project Lead – The grant program manager or other departmental authority for a specific Grantee project in eCivis Grants Network. Also, Project Lead is referred to sometimes as simply the Lead.

Task – A system-generated "to do" that must be completed. Tasks can be manually created, or system-generated as part of a workflow. See Workflow.

Workflow – A series of review and approval activities or tasks that must be completed to accomplish specific parts of the grant process, e.g., State Budget Agency (SBA) pursuance approval or financial reports with/without payment/reimbursement requests from Subrecipients.