TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

Grant Management System (GMS) Manual

Applying for TSLAC Grants

January 2015

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What is the GMS?

The Grant Management System (GMS) is the Texas State Library and Archives Commission's (TSLAC) online grant management system. It allows grant applicants to manage the competitive grant application process, including submitting the grant applications online. GMS also allows grantees to manage all aspects of their TSLAC grant programs including:

- submitting performance and financial reports;
- submitting program and budget revisions; and
- requesting payments.

Recommended Browsers

- Firefox 1.x and up — recommended
- Chrome
- Safari
- Opera
- Internet Explorer 5.5 and up

For the best experience, ensure that Javascript is enabled in your browser of choice.

Accessing GMS

To access GMS, applicants need a GMS user account. A single user may register for single account access or multiple accounts for users within an organization.

To create a GMS user account
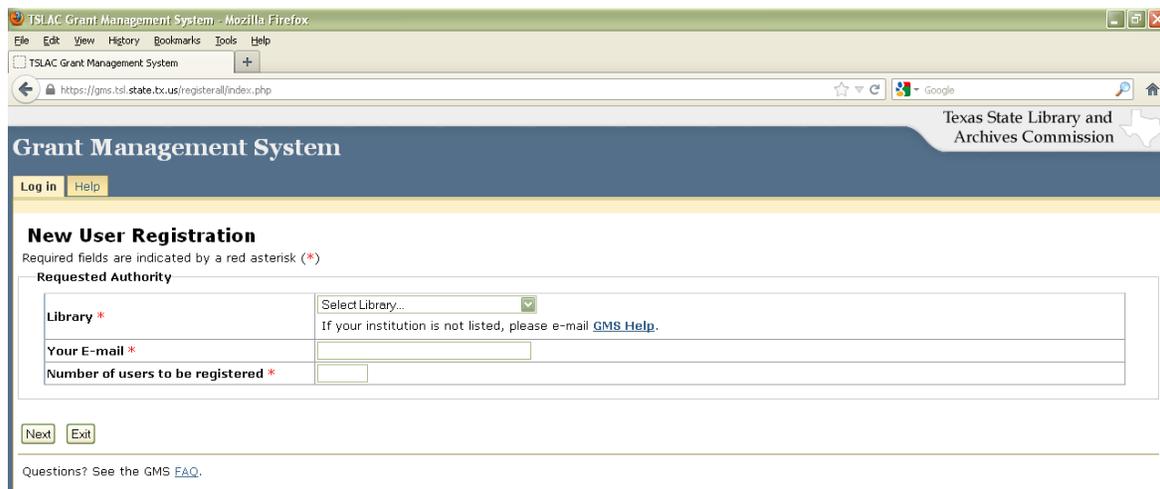
1. Point your browser to https://gms.tsl.texas.gov.
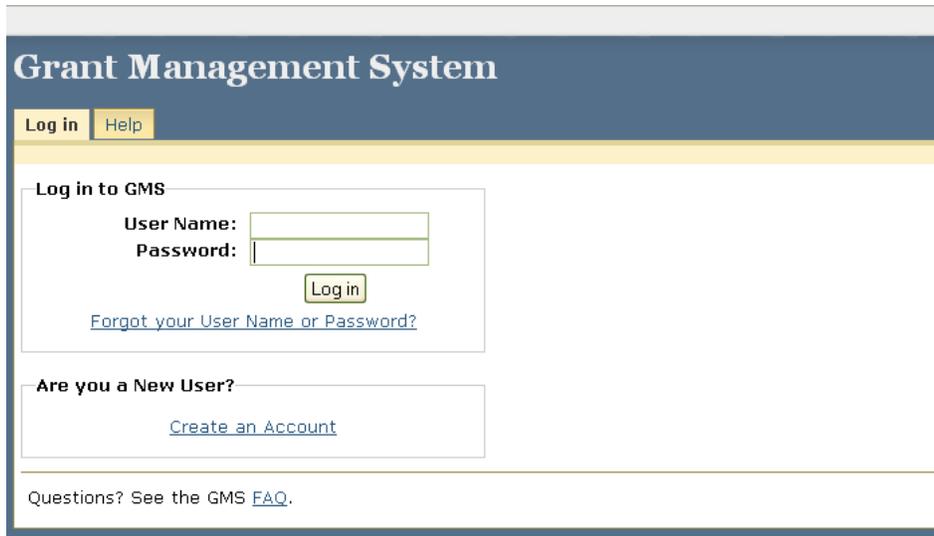
Fig. 1: GMS landing page

2. Click on the **Create an Account** link.

3. Select your library name from the **Library** drop-down menu **(Select Library…).** If your library is not listed, please send an e-mail with the organization's name and address to **GMS Help** at **gms.help@tsl.texas.gov.** TSLAC will contact you when the information is added to the system, at which point you may continue the registration process.

   Input your e-mail address and the number of users to be registered. Select **Next.**

Fig. 2: New User Registration page

4. On the **New User Registration** page, complete each required field as indicated by the asterisk for each user (User 1, User 2…).

   For each **grant type** for which you are requesting access, select the relevant role from the drop-down menu (**Select Role…**). See *Roles and Permissions* on p. 7 for descriptions.

   Input the relevant contact information for each user and answer the verification question.

Fig. 3: New User Registration account data entry page

5. When finished, select **Save**.

6. Your registration confirmation page will display. Print a copy for your records.

Fig. 4: New User Registration confirmation page

TSLAC staff will review your request and approve it if there are no questions or concerns. Once approved, you will receive an e-mail containing your system-generated user name and password. Only the password can be changed.

```
From: gms.help@tsl.texas.gov [mailto:gms.help@tsl.texas.gov]
Sent: Tuesday, January 14, 2014 1:03 PM
To: Big Blue Bird
Subject: GMS Profile Information

Your account has been activated  by the Cooperation Grant Administrator for the
TSLAC Grant Management System.

        User Name: bbl75766
        Password: afdde085


You will be prompted to change your password when you first log in.

Login now:  https://gms.tsl.texas.gov
```

Fig. 5: New user registration confirmation e-mail with user name and password

Roles and Permissions

GMS users may select their 'roles' as needed for each grant type. Each role has been assigned specific privileges to perform specific grant management tasks. Table 1 illustrates the roles that can be assigned.

As a user of the TSLAC Grant Management System, you will need to request and be assigned a role when you complete the GMS registration. Functionality that is not included in the assigned role will not be visible or will be disabled.

Role	GMS Privileges
Grantee Official *Usually the library director, interlibrary loan librarian, grant/development office, dean, but not limited to these positions.*	Can perform <u>all</u> grant management duties including: • submitting the application and • creating, modifying, and submitting all reports and revisions
Legal Entity Official *An individual with authority to enter into contracts on behalf of the applicant. Usually the city/county official, incorporated board/board executive, library director, provost/chancellor/president of institution, but not limited to these positions.*	Can submit applications
Program Manager *Usually the assistant library director or library program manager, but not limited to these positions* <u>Note:</u> *In situations where the person creating the grant is the Grantee Official, this role would not be used.*	• Can create and modify applications • Can create, modify, and submit financial reports • Can create, modify, and submit requests for funds • Can create, modify, and submit performance reports • Can submit financial revisions
Financial Manager *Usually the legal entity business office official authorized to certify expenditures*	• Can create, modify, and submit financial reports • Can create, modify, and submit requests for funds • Can submit financial revisions
Financial Contractor	• Can create, modify, and save financial reports • Can create, modify, and save requests for funds
Grantee Viewer *Anyone with permission to access the grantee's GMS site*	• Can only view records

Table 1: GMS user roles and privileges

Navigating GMS

Once you receive your assigned username and password, you may log in to GMS at https://gms.tsl.texas.gov.

Once in, you should change your password by selecting **Update user profile** on the right side of web page.

After logging in, your **Home Page** will display summaries related to the grant programs you are registered to manage. The **Log out** tab can be used for exiting the system at any time. ***Note: GMS will end your session after 3 hours if there is no activity.***

Fig. 6: User GMS Home Page

The Grantee Summary lists the grant programs for which your library or organization is registered to apply or has already applied. Additional summaries that may appear will pertain to overdue or returned grant requirements such as reports and requests for funds.

The columns included in the Grantee Summary are:
- **Grant Abbreviation –** Abbreviated grant name used in GMS
- **Application Due Date** – Deadline for grant applications to be submitted to TSLAC
- **Application Status** – Provides the current status of the grant application:
  - OPEN - Grant cycle is open, but the application process has not been started.
  - NOT SUBMITTED – Application has been started but not submitted or returned to applicant for revision.

- o PENDING – Grant has been submitted and is pending approval.
- o APPROVED – Grant has been approved by TSLAC.
- o NOT AWARDED – Grant was not approved for funding by TSLAC.
- **Action** – The drop-down box will indicate the actions you may take with the listed grant depending on what step in the grant application process you are in.

  In the beginning of the application cycle, you will only have one action available to you: Open Application – to begin or continue the application process.

  If the grant is awarded, the following actions will be available:
  - o Request Funds – to request reimbursement for funds expended
  - o Submit Grant Revision – to request a budget or program revision
  - o Submit Financial Report – to submit financial status reports
  - o Submit Performance Report – to submit quarterly or semi-annual performance reports
  - o Submit Equipment Report – to submit an inventory of equipment purchased with grant

Applying for a Grant

From the **Action** column drop-down box in your **Grantee Summary**, select **Open Application**. The Application Form checklist (**Apply for this Grant** tab) will display, listing the parts to the application and their individual statuses.

Fig. 7: Application Form checklist (**Apply for this Grant** tab)

For each of the application forms listed — Applicant Information, Budget, Narrative — information must be entered and saved in GMS.

The remaining forms — CIPA (mandatory) and Outcomes Logic Model Template (optional) — should be filled out in Microsoft Word and submitted by e-mail, fax, or hardcopy to the TSLAC Grants Administrator by the application due date.

The grant guidelines should be printed for reference and used to prepare the budget and narrative portions of the online application.

Navigating the Application

- Select the **Edit** button to begin entering data. Select **Printer-friendly** and save as a PDF when a clean formatted copy is needed (i.e., when preparing the Applicant Information form for signatures).
- You may save or exit a form by clicking the **Save** or **Exit** buttons at the bottom of each form.
- Once you have started an application form, DO NOT USE THE BACK BUTTON TO NAVIGATE. This may cause problems in saving and submitting the application.
- Use the **Print Application** button on the Application Form checklist to print the full application.

Entering Data in the Application Forms

- Follow the grant program guidelines.
- Follow the instructions for each form.
- Prepare draft responses in a word processing program and cut and paste the information into the relevant forms.
- ALL application information must be submitted in the online forms. GMS does NOT allow additional documents to be uploaded into the system.
- DO NOT USE ALL CAPS. Enter all text in standard sentence case (upper and lower case).
- Users must tab out of a field to see any calculations (if applicable).
- Do not include tables. GMS will not capture the formatting.
- Use the ***Budget Category Descriptions*** on p. 11 to complete the budget table.
- Be certain to save your data as entered by clicking the **Save** button at the bottom of each form. After you save and exit each forms, you will see the **Date Saved** and a green check appear in the **Form Status** column.
- After you save the first form, GMS will assign your application an ID number (**Application ID**); the application **version** number will also appear in the header.
- By saving your information, you will be creating a working file for your application for this grant, which you are under no obligation to complete and/or submit. You may log in to GMS as many times as you wish before the due date to work on your application.
- Click on the **Help** icon for detailed information related to a particular item.

Submitting the Final Application

- An application cannot be submitted if it contains errors. Error messages will display in red if required fields are not filled in properly.
- Only the Grantee Official or Legal Entity Official can submit a grant application. When the final application is ready to submit, the Official may submit it by clicking the **Submit Application** button. GMS will display a confirmation message if the application was successfully submitted.

Budget Category Descriptions (rev. 1/2015)

Title: Supplies (Library Materials)	**Category: Budget Categories**
Include costs for supplies and materials, purchased specifically for the project. It also includes software, books, audiovisual materials, DVDs, CDs. ***Narrative should include descriptions and quantities of supplies/materials purchased.***	

Title: Personnel	**Category: Budget Categories**
Full and part-time employees whose salary you will pay with this grant. Temporary employees including persons hired to help with cataloging, story times, library programming, computer services, reference or circulation desk service, etc. ***Note:*** Exclude employee benefits and report those under Fringe Benefits. Narrative should include position titles (but not names) and number of FTEs in description.	

Title: Fringe Benefits (Employee Benefits)	**Category: Budget Categories**
Benefits you will be paying that are outside of salary and wages paid and accruing to employees. Includes amounts as applied for direct, paid employee benefits including Social Security, retirement, medical insurance, life insurance, guaranteed disability income protection, unemployment compensation, workers' compensation, tuition, and housing benefits. ***Note:*** List the benefits and identify the service or project from the Personnel section for which these benefits will be used.	

Title: Equipment/Property	**Category: Budget Categories**
Tangible property (furniture and equipment, including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by the governmental unit for financial statement purposes or $5,000) May include computer-related equipment or furniture, audio/visual equipment, microform equipment, shelving, office or library furniture, office equipment, computer systems, etc. ['Information technology systems' refers to local area networks (LAN), wide area networks (WAN), automated circulation system, online public access catalog (OPAC), etc.] **Note:** A Controlled Assets list is located at the end of Appendix A Class Codes. 'Property Controlled But Not Capitalized' https://fmx.cpa.state.tx.us/fmx/pubs/spaproc/appendices/appa/appa_6.php.	

Budget Category Descriptions - continued (rev. 1/2015)

Title: Services	Category: Budget Categories
Work performed by an independent or third-party contractor or vendor, including a formal partner. Agreements for specialized programming, training, annual equipment maintenance and other services are examples. Includes ebook vendor contracts, Internet access, etc. Narrative should include description of services provided and names of vendors.	

Title: Consultant Fees	Category: Budget Categories
Includes expenses related to acquiring the services of a consultant for a specific activity within the project. Costs may include fees, travel, accommodation, and support services hired directly by the consultant. Narrative should include the consultant's name and a description of the consultant's expertise along with actions/contributions to the project.	

Title: Travel	Category: Budget Categories
Costs must be related to the project activities and must be incurred by the staff working on the project, NOT program participants. May include airfare, ground transportation, accommodation, meals, etc. Narrative should include number of travelers and description of types of travel expenditures.	

Title: Supplies (Equipment)	Category: Budget Categories
Include costs for computing devices (if the cost per unit is less than the lesser of the capitalization level established by the governmental unit for financial statement purposes or $5,000) purchased specifically for the project. **Includes desktop computers, laptops, cameras, e-readers and tablet computers, audio equipment, data projectors, video players/records, televisions, etc. Narrative should include descriptions and quantities of equipment purchased.**	

Budget Category Descriptions - continued (rev. 1/2015)

Title: Indirect Costs	Category: Budget Categories

Incurred costs that cannot be readily isolated or identified with just one project or activity. These types of costs are often referred to as "overhead costs." The amount is included as part of the total grant award. Typical examples of indirect costs are general telephone service, postage, office supplies, office space expenses, and administrative or financial operations for an entire organization. You may do one of the following:

1. Use a current indirect cost rate already negotiated with a federal agency;
2. Use an indirect cost rate proposed to a federal agency but not yet approved;
3. Use a rate not to exceed 10% of modified total direct costs if you have never had a federally negotiated indirect cost rate and you are not subject to other requirements (e.g., for States and Local Governments, and Indian Tribes); or
4. Not include any indirect costs.

Title: Program Income	Category: Budget Categories

The gross income earned by a grantee from the activities supported by grant funds or from products resulting from grant activities. It includes, but is not limited to, income from fees for services performed and from the sale of items created under a grant, usage or rental fees for equipment or property acquired under a grant, and license fees and royalties from patents and copyrights.