

OEDIT Online Portal Handbook

Navigating the new **OEDIT** online portal

- Login Instructions
- Navigating the application
- Save a draft of your application
- Submit a report
- View submitted applications and reports
- Visual instructions for navigating the portal
- Visual instructions for past applications and reports
- Tips

Login Instructions

- If you are a previous CTO grantee, your information was transferred from the previous portal to the new online portal in summer of 2024.
- Your username is the email address used in the previous system followed by .oedit. For example, if your email is john.doe@gmail.com, your new username is john.doe@gmail.com.oedit.
- To create a new account, go to the <u>login page</u> and click Not a member?.
- New users will use their email followed by .oeditcc for the username. For example, if your email address is john.doe@gmail.com, then your username would be john.doe@gmail.com.oeditcc.
- If you need to reset your password, click Forgot Your Password? and enter your username.
- New accounts are authorized manually by the OEDIT Salesforce team. This
 process can take up to 48 hours.

Note: If you are a new user signing up on behalf of an existing organization that
has worked with the CTO, please reach out to Sami Wells
at <u>Sami.Wells@state.co.us</u> once you receive your login credentials to ensure you
get connected to the appropriate organization.

Navigating the Application

- 1. Log into the portal here.
- 2. Click on the "Colorado Tourism Office Programs" tile on the Home page. You can also click on the "More" tab at the top of the page.
- 3. A list of the CTO programs will be available. Select the grant of interest.
- 4. If the grant is currently accepting applications, a condensed version of the grant guidelines will show. Select "Next" to continue.
- 5. Complete the application eligibility questions, and then select "Next".
- 6. Complete the form and required uploads before hitting Submit. All required questions will have a red asterisk and will not allow you to move forward until those are completed. Please reference the program guidelines for more information.

Note: We encourage applicants to answer questions to the application in a separate document. Copy and paste answers into the form and save the document for your records.

Note: Files need to be uploaded from the Desktop or a Folder stored directly on the applicant's hard drive. Do not attempt to upload from cloud-based sources.

7. Once an application is submitted, note the IA# created for the application in the "Applications" menu at the lop left of the page. Write the Application ID (referred to as the Individual Application number or IA#) down as approved applications will submit reports on that application in future dates.

Saving a Draft of Your Application

1. To save a draft of your partially completed application, use the Save for Later button at the bottom left of your screen. It will then generate a URL link for your application draft. You can copy and save that URL link to access the draft later.

You can also access your draft links by clicking on "Applications" at the top left of the portal page and selecting "Saved Submissions" from the dropdown menu. You will then see a list of previous drafts.

Note: Every time you click "Save for Later" it will create a new draft link, so be sure to select the submission with the newest timestamp. Click on the IA number and then click on the link in the URL draft field. (screenshots below in the visual instructions section).

- Upon returning to draft submission, you can complete the application by clicking submit. A confirmation message will appear on the screen once you've successfully submitted the application. The new portal does not send a separate email confirmation to users.
- 3. You can review your submitted application by clicking on "Applications" at the the top of the page and selecting "Applications" from the dropdown menu. You will see your Applications ID (IA#) with the date and time you submitted your application, organization name, date applied, application status, the funding opportunity, along with some other information in a table list view.
- 4. All submitted applications will have the "Submitted" status. You can click on the Application ID to see your submission details.

Submit a Report

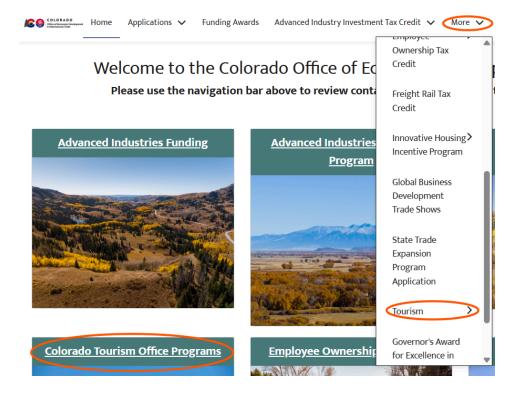
- 1. To submit a report for a grant you have been awarded, navigate to the Applications menu at the top of the Home page.
- 2. Next, click on "Applications" to view your approved applications.
- 3. Select the Application ID (IA#) for the approved grant that is due for a report. You will receive this IA# in your award letter, and are encouraged to note your IA# down for all future reporting.
- 4. Scroll to the bottom of the IA# information page and a section for submitting reports will be available if reporting is due. Refer to your grant guidelines for reporting deadlines.
- 5. To view previous reports, and confirm your report was successfully submitted, select "View All" under the Reports Box on the right side of the screen.

Viewing Applications and Reports

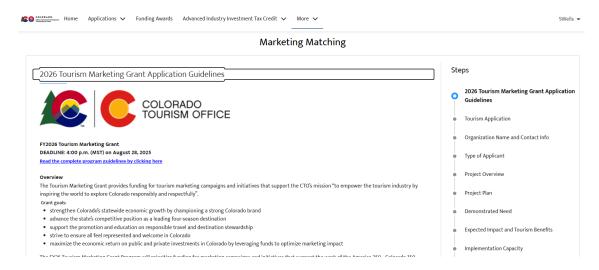
- 1. You can review your submitted application by clicking on "Applications" at the top of the page and selecting "Applications" from the dropdown menu.
- 2. You will see your application number (IA#) with the date and time you submitted it, the program name, and the status will reflect the current stage submitted, panel review, denied, or approved.
- 3. If you don't see all your previous applications, you may need to change the view from "Recently Viewed" to "All Applications" by clicking on the downward arrow next to the left of the pushpin icon.
- 4. You can click on the application ID number, which will take you to an overview of your application. To see the responses from your application, click on the Tourism Summary Name on the right of the screen in the Tourism Summaries box.

Visual Instructions for Navigating the Portal

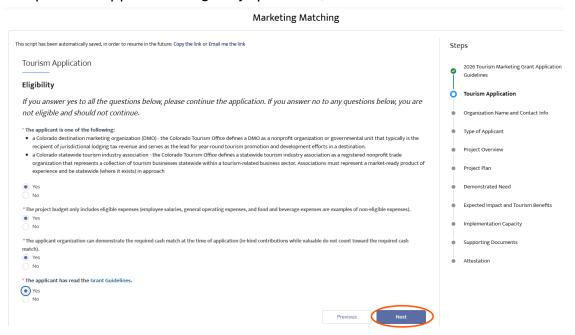
- 1. Log into the portal here
- Once logged in, you will be taken to the OEDIT Portal Home page. To access grants, click on the Colorado Tourism Office Programs tile or the "More" tab at the top of the page and select "Tourism" from the dropdown menu.



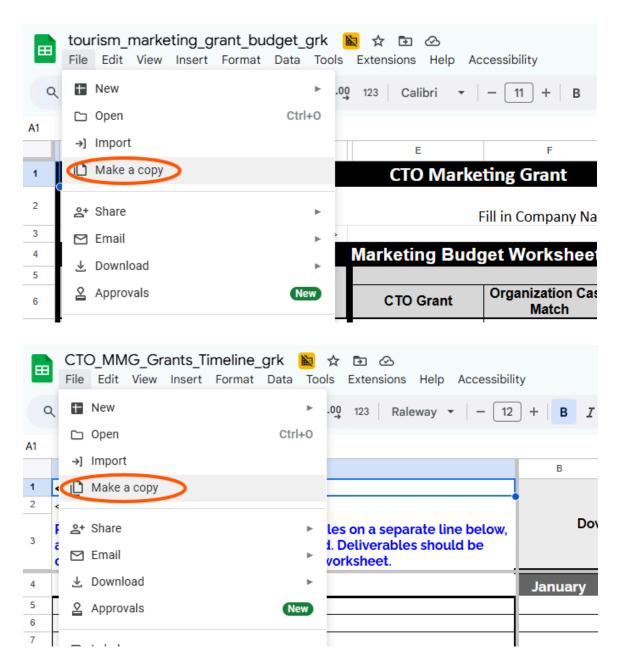
- 3. You'll then see another dropdown menu with the list of all the CTO programs. Select the one of interest.
- 4. If the grant is currently accepting applications, a condensed version of the grant guidelines will show. Select "Next" to continue.



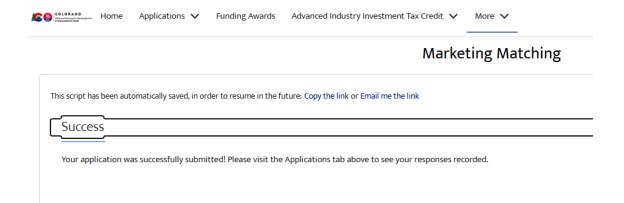
5. Complete the application eligibility questions, and then select "Next"



6. Complete the form and required uploads before hitting Submit. All required questions will have a red asterisk and will not allow you to move forward until those are completed. Please reference the program guidelines for more information. There are two downloadable documents: a project budget and a project timeline. For both, you will need to save a copy to your computer.



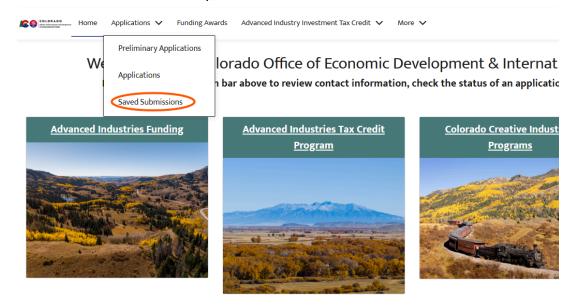
7. A confirmation message will appear on the screen once you've successfully submitted the application.



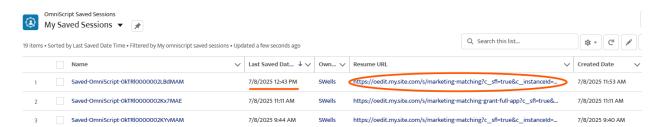
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Saving A Draft

- To save a draft of your partially completed application. You can use the "Save for Later" button at the bottom left of your screen. It will then generate a URL link for your application draft. You can copy and save that URL link to access the draft later.
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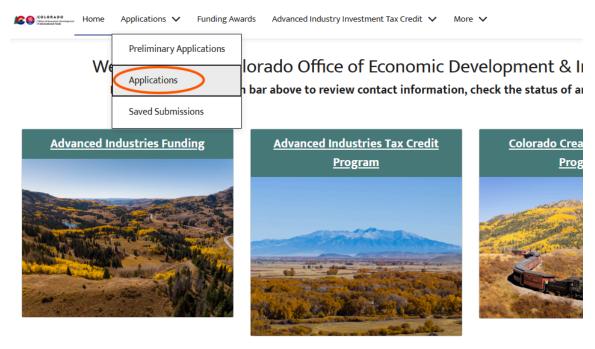
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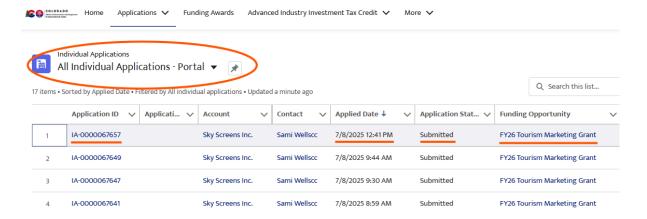
4. Click on the link under "Resume URL" to access your draft application.

Viewing Past Applications and Reports

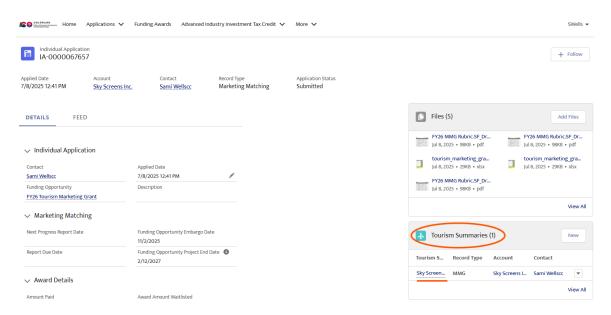
1. You can review your submitted application by clicking on "Applications" at the the top of the page and selecting "Applications" from the dropdown menu.



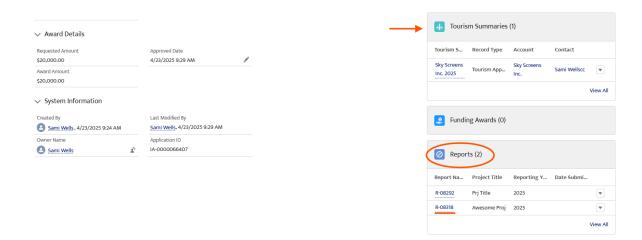
2. You will see your application number with the date and time you applied, the program name, and the current status.



- 3. If you don't see all your previous applications, you may need to change the view from "Recently Viewed" to "All Applications" by clicking on the downward arrow next to the left of the pushpin icon (see image above).
- 4. You can click on the Application ID number, which will take you to an overview of your application. To see the responses from your application, click on the Tourism Summary Name on the right of the screen in the Tourism Summaries box.



- 5. The Tourism Summary will show you all your responses from your application. Any uploaded files can be found in the "Files" section above the Tourism Summaries section on the overview page (see image above).
- 6. To view a report for an application, from the IA number overview scroll down to see a Reports section to the right of the screen below Tourism Summaries. Click on the report number to see the submitted report.



Tips

- 1. The online portal will log you out after 4 hours of inactivity. Data may be lost between the last time a save was triggered and the logout.
- 2. The Save for Later function will not operate on a page with empty required fields. Click back to a previous section by using the navigation on the right side of the page.
- 3. If you experience issues with file uploads, try shortening the filename.
- 4. Use the provided Question document to answer the questions. Save this copy for your records and paste your answers into the online form.

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