## PA-SHARE Tutorial:
## SUBMITTING KEYSTONE GRANT PROJECT INFORMATION

This tutorial will teach users how to enter additional information for an *existing* Keystone Grant Project. This process is consistent for Status Reporting - both quarterly and final, Preliminary Project Reviews, and final Work Products.

Review the complete tutorial or navigate to a specific section by hovering over an entry in the Table of Contents and following the instructions.

## Contents

## Overview

This section will outline the steps needed to submit information such as a Quarterly Status or Final Report, plans and specifications for review, or grant work products for an *__existing__* Keystone grant project using the Project Supplement wizard. You are **NOT** using this process to data enter any **NEW** projects into PA-SHARE.

The PA-SHARE system is available at https://share.phmc.pa.gov/pashare/landing. Step-by-step instructions for signing in to PA-SHARE, understanding the map, and other functions are available on the PA SHPO website at www.phmc.pa.gov/PA-SHARE/Pages/Help-Materials.aspx. The Frequently Asked Questions webpage at https://www.phmc.pa.gov/PA-SHARE/Pages/PA-SHARE-FAQ.aspx also has helpful information. Users are also encouraged to contact the PA-SHARE Help Desk at pashare@pa.gov with questions or problems.

## Accessing the Project Supplement Wizard

There are two ways users can access the Project Supplement wizard:

### From email link

Click the link sent to you in an email from PA-SHARE. To use this link, you must be listed as a project contact in PA-SHARE. We recommend signing in to PA-SHARE and having it open in your browser *before* clicking the link the in email. This will automatically take you the Project Supplement wizard for your specific covenant project.

### From PA-SHARE

You can also get to the Project Supplement screens through the Project Supplement wizard on the Submit home screen. Once you sign in to PA-SHARE, you will see the Home screen. To go to the Submit screen, click the "Submit" button at the top of the screen or click on the icon in the second blue tile in the left column.



From the Submit home screen, you can navigate to Project Supplement wizard by clicking "Project Supplement" from the gray navigation bar on the left side of the screen OR by clicking "VISIT" on the Project Supplement card.
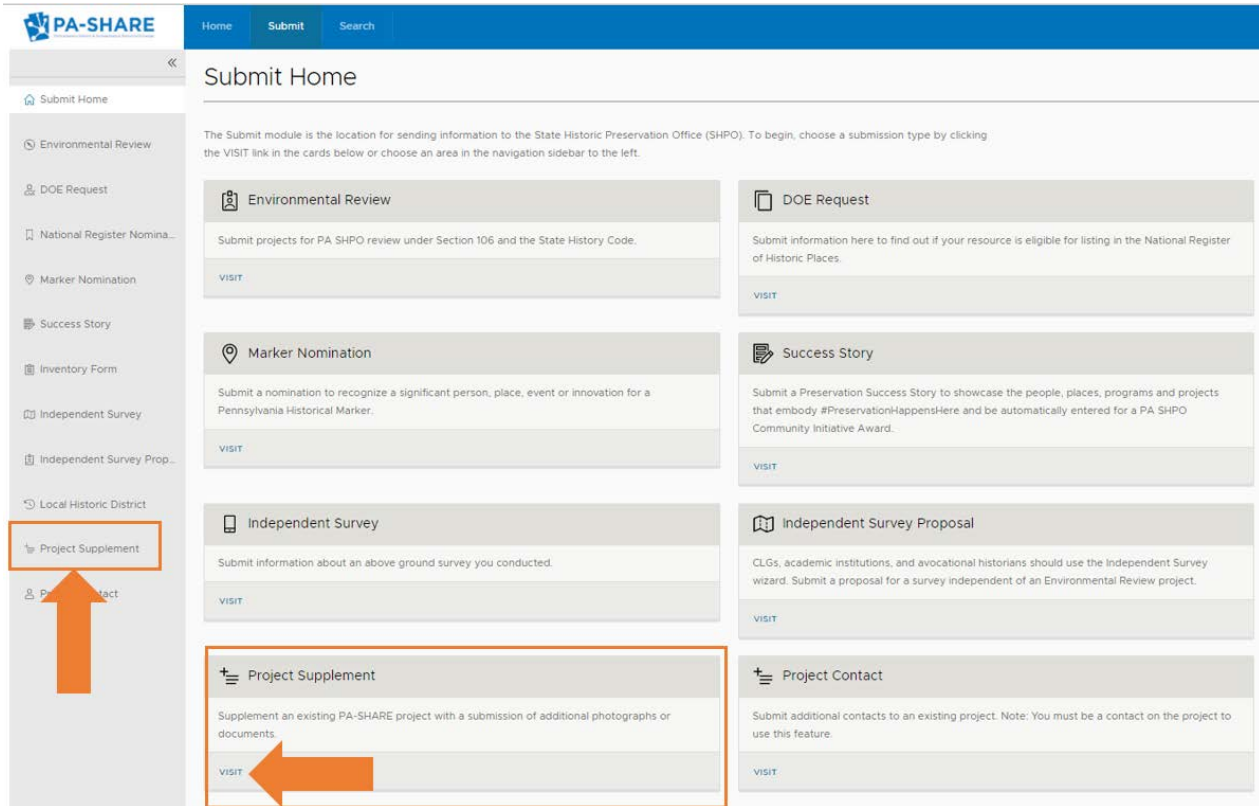
This is how the Project Supplement Submission screen will look when it opens in PA-SHARE:



The email address you used to register for PA-SHARE will auto-populate in the Email Address field. The email address must be an existing project contact for the Keystone grant project you are searching for; if not, you will not be able to find the project and submit the additional information.

Enter the project number of Keystone grant project. This number will be the 11-digit PA-SHARE project number format of YYYYPR#####.  Please contact Karen Arnold, kaarnold@pa.gov if the Project Number of the Keystone grant project cannot be found.

Once both fields are completed, click "Search".  Once the search is completed, the full Project Supplemental Submission Screen will open.

## Project Supplement Wizard Data Entry

NOTE: Your session will timeout after 30 minutes of inactivity and any unsaved changes will be discarded. To ensure information is not lost, we recommend saving the information you enter after completion of each section.

The Project Supplemental Submission screen includes three sections that need to be completed:

- Project Supplemental Description
- Project Documents
- Project Photos

| | |
|---|---|
| Project Supplement Description * <br><br>1,000 of 1,000 characters remaining | **Project Supplemental Description**: Include a very brief description of the information submitted. Quarterly Status Report or Preliminary Project details are sufficient.<br><br>This field is limited to 1,000 characters. Users are able to copy and paste from another document into this field using the ctrl+V function. |
| **Project Documents**<br><br>ADD AN ATTACHMENT<br><br>Attachment Type / Attachment Name / Date Created | **Project Documents**: The report templates provided by the Keystone Grant Manager can be uploaded in the Project Documents section.<br><br>Include information that would be useful to the understand the status of the project such as:<br><br>- Ongoing fundraising efforts or source of cash match<br>- Consultants under contract or status of selection process<br>- Architectural or engineering plans |

- Specifications for proposed work, including methods and materials, if ready for review



**Project Photographs:** Color photographs showing work in progress must accompany each quarterly report. Please provide views that provide not only the existing condition and context of proposed project location.

## Instructions for Adding Attachments



Click the "Add An Attachment" button to begin.

More than one attachment may be added.



The Attachment Detail window will open.

Complete each of the required fields on the Attachment Detail screen.

Direction for uploading attachments is provided in the help on the right side of the screen.

NOTE: The maximum file size is 70MB.

Attachment Source *
File from Local Disk ∨

Name/Title *
Test
196 characters remaining

Select An Attachment Type *
Document ∨
Select an attachment type

Description

Description

1000 characters remaining
Select files...          Drop files here to upload

**Attachment Source**: Select attachment source. Always choose "File from Local Disk" to upload a file from your computer (or shared network like SharePoint or common server).

**Name/Title**: Provide a general descriptive name for the attachment.

**Select An Attachment Type**: Select the type of attachment from the dropdown menu. If you are unsure, choose "Document".

**Description**: Provide a more detailed description of what is included in the attachment or what information the attachment provides.

Once the last field is completed, the Select Files button at the bottom of the Attachment window will be activated.

Select files...          Drop files here to upload

PA SHPO Annual Report 2020 FINAL.pdf
10.12 MB                                    ✕

Upload

Click the "Select Files" button to select the location of the file to be uploaded from your computer.

Once the file has been selected, the name and size will show in the space below.

Click "Upload" to add the attachment.

Attachments

ADD AN ATTACHMENT                                    VIEW  EDIT  DELETE

| Attachment Type | Attachment Name | Date Created | Description |
|---|---|---|---|
| Document | Test | 06/21/2021 | |

Attachments: 1

Once the attachment is uploaded, it will appear in the attachments grid. Select the attachment to view, edit, or delete.

## Instructions for Adding Photographs

## Project Documents

⬛ ADD A PHOTO(S)

| Image | Name | Date |
|---|---|---|

Click the Add A Photo(s) button to begin.

The Photo Detail window will open.

All of the fields on the Photo Detail screen are required.

Direction for uploading photos is provided in the help on the right side of the screen.

NOTE: The maximum file size is 70MB.



**Photo Source**: Select photos source. Always choose "File from Local Disk" to upload a file from your computer (or shared network like SharePoint or common server).

**Name/Title**: Provide a general descriptive name for the photo indicating what is shown, such as House, Exterior.

**Description**: Provide a more detailed description of what is shown in the photo, such as south elevation.

**Photo Date**: Provide the date the photo was taken. If the exact date is not known, provide an approximate date.

Once the last field is completed, the Select Files button at the bottom of the Photo Detail window will be activated.



Click the Select Files button to select the location of the file to be uploaded from your computer.

Once the photo has been selected, the photo name and size will show in the space below.

Once a photo is uploaded, it will appear as a thumbnail with the name, date of the photo, date the record was created, and description of the photo.
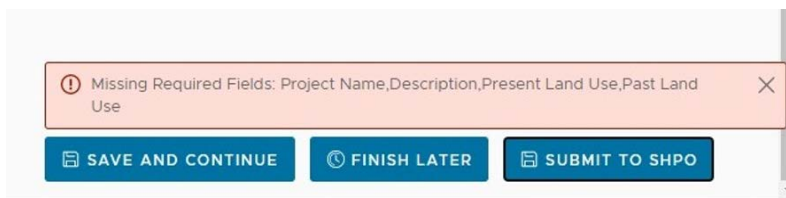
Repeat the same process to add additional photos.

## Submit Your Project to the SHPO



Once you have completed each section, send your submission to the PA SHPO.

Click the Submit to SHPO button.



If required fields were not completed, a red box identifying which fields are outstanding will appear above the buttons.

Close the red box by clicking the X in the upper right corner. You will need to return to and complete the listed fields before saving.
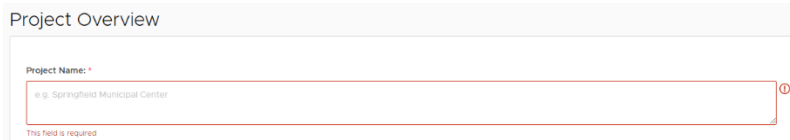


Scroll to the top of the submission screen to find the sections with missing information.

They will be highlighted with a red box and a red exclamation point. These will disappear as you enter the information.



When your submission is complete, a window will appear with your submission token number.

This token number will also be sent to the primary contact on the project.

## Reimbursement Requests for Your Project

The PA-SHARE system will not process reimbursement requests for the Keystone program.  All such requests should be emailed directly to Karen Arnold, Keystone Grant Manager at kaarnold@pa.gov.