



# Electronic Grant File

GrantSolutions GMM

March 2019

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## Introduction to Electronic Grant File

The GrantSolutions **Electronic Grant File** is used by Grantors to view and export documentation associated with an awarded Grant Project from a single location.

The Electronic Grant File contains the following documentation for awarded and historical awards:

- Original Submission Applications
- Online Forms
- Application Enclosures
- Application Attachments
- Post Submission Documents
- Application and Grant Notes
- Project Assessments
- Funding Memo Attachments
- Project Abstract
- Notice of Award





## Access the Electronic Grant File

To access the Electronic Grant File (EGF) for an award, conduct a search from the GrantSolutions GMM “Grants List” Simple or Advanced search screen.

When the *Results* table appears, select the **grant number link** or the click the **EGF icon** (  ) from the *Actions* column.

Grants List

Simple Search

Assignment Type  All Grants   

[50](#) | [100](#) | [150](#) | [200](#) | [1000](#) ⏪ ⏩ 1 2 3 4 5 ⏪ ⏩















Grant Number	2 ▾	Organization	Project Period Start Date	3 x ▾	Project Period End Date	Project Status	Actions
01 02			09/30/1996		06/30/2025	Multiple Amendments In-Progress	      
01 24			03/01/2016		02/28/2021	Multiple Amendments In-Progress	      

Figure 1: Grants List screen: Grant Number link and EGF Icon

The “Electronic Grant File – Project Documents” screen opens in a new browser tab. The page contains the following sections:

- *Project information:* Read-only information about the Grant Project
- *Search section:* Refine search results, export search results, and save searches
- *Results table:* Table containing all available documents associated with the Project
- *PDF and Zip Extract buttons:* Save selected documents as a PDF or Zip file

The screenshot shows the 'Electronic Grant File' interface. At the top, there's a header with the GrantSolutions logo and 'Electronic Grant File' text. To the right are tabs for 'DOCUMENTS' and 'EXTRACTS', and a user profile 'NBROWN9'. Below the header, the 'PROJECT DOCUMENTS' section is highlighted. It contains a 'Project Information' box with fields for Organization Name, Grant# (01), Duns, Number Of Budget Periods (3), and Number Of Amendments (1). Below this is a 'Search Section' with dropdowns for Budget Period and Source, and buttons for SEARCH, ADVANCE SEARCH, and EXPORT SEARCH RESULTS. Below the search section is a 'Results Table' with a table of document records. The table has columns: Document Name, Description, Source, Award Number, Application Type, Date Uploaded, Amendm..., Budget Period, and Created By. The first row shows a 'Notice Of Award' document.

Document Name	Description	Source	Award Number	Application Type	Date Uploaded	Amendm...	Budget Period	Created By
Notice Of Award	01 Annual Funding Non-Competing Continuation Remarks	Awards Processing	01 - 00	Non-Competing Continuation	2/26/2017	Initial Review	BP2 (2/28/2017 - 2/27/2018)	1

Figure 2: Electronic Grant File screen – Sections

This screenshot focuses on the bottom section of the interface. It shows the 'PDF and Zip Extract Buttons' area. Above the buttons is a pagination bar with 'Show 20 records per page. Page 1 of 2. Total 24 records.' and navigation links. Below the pagination bar are two buttons: 'GENERATE PDF EXTRACT' and 'GENERATE ZIP EXTRACT'.

Figure 3: Electronic Grant File screen – Extract Buttons

## Navigating the Electronic Grant File

When the Electronic Grant File opens in a new browser tab, the landing page is the “Project Documents” screen.



Figure 4: Electronic Grant File - Menu Options

Three tabs appear in the top right corner:

- **Documents:** Click the **Documents** tab to view the “Project Documents” screen. *Project Information, search fields, the results table, and Generate PDF Extract and Generate Zip Extract buttons are located here.*

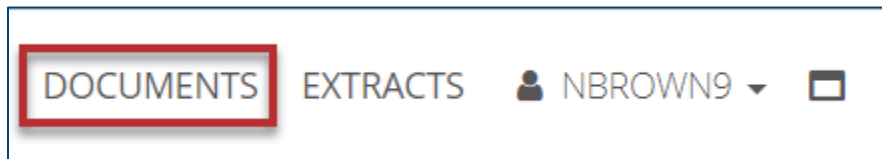


Figure 5: EGF screen - Documents tab

- **Extracts:** Click the **Extracts** tab to view the “Project Extracts” screen. When the Generate PDF Extract or Generate Zip Extract buttons are selected on the “Project Documents” screen, the extracts are available to download here.

**Note:** Refer to the sections titled, “View PDF and Zip Extracts” and “Download Extracts” for more details.

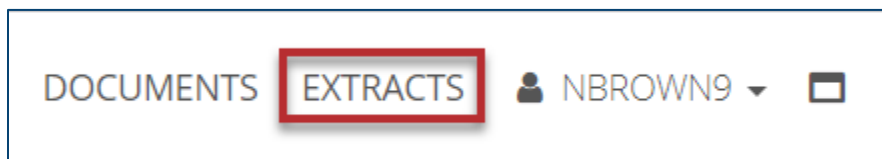


Figure 6: EGF screen - Extracts tab

- **Username:** Click the **Username** tab to access the link that closes the Electronic Grant File.

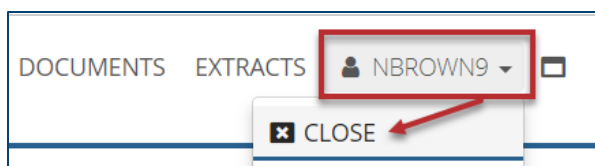


Figure 7: EGF screen - Username tab

To the right of the *Username* tab, a window icon appears. Click the **window** icon to widen the layout of the screen.

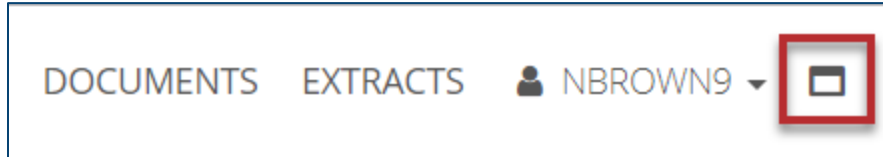


Figure 8: EGF screen - Window icon

To return the screen to the default view, click the **window** icon again.

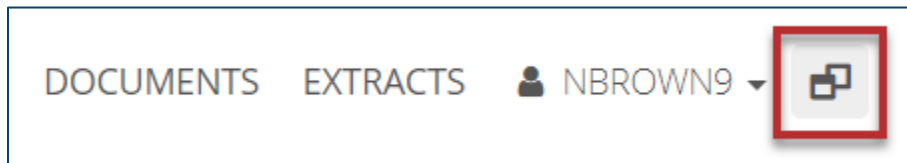


Figure 9: EGF screen - Window icon

The first section of the “Project Documents” screen contains Project information, such as:

- *Organization Name*
- *Grant Number*
- *DUNS Number*
- *Number of Budget Periods*
- *Number of Amendments*
- *Total Award Amount*
- *Project Period Dates*

PROJECT DOCUMENTS

Organization Name:
Grant#:
Duns:
Number Of Budget Periods:
Number Of Amendments:

01
4
9
3
1

Total Award Amount:
Project Period Dates:

\$309,428.00
2016-03-01 - 2021-02-28

Figure 10: EGF screen - Project Information

**Note:** To hide this information, click the “X” icon in the top right corner of the section.

The *Search* section, *Results* table, and *Extract* buttons are detailed in this guide.

## Search Section

### BUDGET PERIOD AND SOURCE DROP-DOWN LISTS

Use the *Budget Period* and *Source* drop-down lists to filter documents in the *Results* table.

Select a **Budget Period** to limit results by that period.

Click the **Source** drop-down arrow to select the type of files to display (ex. Awards Processing, Grant Notes, etc.). The *Source* options available for selection are determined by the results populated in the table. Click the **Search** button to activate the search.

The image shows a search interface with two drop-down menus labeled 'Budget Period' and 'Source'. Both menus are currently empty. To the right of these menus is a button labeled 'SEARCH'. The entire search section is enclosed in a blue border.

Figure 11: Search section: Budget Period and Source drop-down lists and Search button

### EXPORT SEARCH RESULTS

To save the list of documents in the *Results* table to an Excel spreadsheet, click the **Export Search Results** button.

Include a subset of documents from the *Results* table by selecting the checkboxes to the left of the document name(s).

The image shows the search interface with the 'EXPORT SEARCH RESULTS' button highlighted. Below the search section, there is a table with columns: Document Name, Description, Source, Award Number, Application Type, Date Uploaded, Amendm..., Budget Period, and Created By. The first two rows of the table are visible. The first row is 'Notice Of Award' with description '01 Annual Funding Non-Competing Continuation Remarks'. The second row is 'Notice Of Award' with description '01-01-00 NCN Remarks'. To the left of the table, there is a checkbox for each row, and the first checkbox is checked. Above the table, there is a 'Show 20 records per page. Page 1 of 2. Total 24 records.' and a pagination bar with buttons for navigation.

Figure 12: Electronic Grant File - Export Search Results button



## ADVANCED SEARCH

Select the **Advanced Search** button to refine search results. Advanced searches can be saved for future use.

Figure 13: Electronic Grant File - Advanced Search button

When the **Advanced Search** button is clicked, additional fields open directly above the Search button. The *Advanced Search* section contains the following options:

- **Document Name:** Enter full or partial **text** to search for a document name.
- **Application Type:** Click the **Application Type** drop-down arrow to search for a specific application type. Types available for selection are determined by the results populated in the table and may include *Competing Continuation*, *Direct Supplement*, *New*, *Non-Competing Continuation*, and *Post Award Amendment*.
- **Created By:** Click the **Created By** drop-down arrow to filter results by the username of the person that added the document.
- **Source:** Click the **Source** drop-down arrow to select what type of files to display. The Source options available for selection are determined by the results populated in the table.
- **Budget Period:** Select a **Budget Period** from the drop-down list to limit results by that period.
- **Amendment Number:** Search for documents associated with an Initial Award or any of the subsequent Amendment actions.
- **Created/Uploaded Date Start** and **Created/Uploaded Date End:** Use the calendar widgets to set date parameters regarding when documents were uploaded.

Figure 14: Advanced Search options

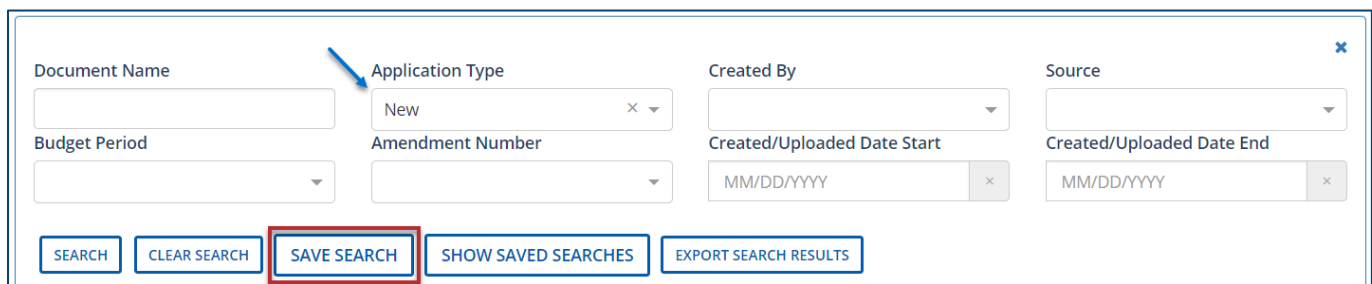
Once criteria is entered, click the **Search** button to run the search or click the “X” icon in the upper right corner to close the Advanced Search.

The *Save Search* button allows users to save the selected search criteria for future use. Saved searches are only available to the user that created the search and are specific to the Grant Project.

**Note:** Searches saved in one Grant Project's Electronic Grant File are not available for another Project's Electronic Grant File.

To save a search, perform the following steps:

1. Enter search criteria in at least one field. The *Clear Search* and *Save Search* buttons appear. Click the **Save Search** button.



The screenshot shows the 'Advanced Search' interface. It contains several input fields: 'Document Name', 'Application Type' (with a dropdown menu showing 'New'), 'Created By', 'Source', 'Budget Period', 'Amendment Number', 'Created/Uploaded Date Start', and 'Created/Uploaded Date End'. Below these fields are five buttons: 'SEARCH', 'CLEAR SEARCH', 'SAVE SEARCH' (highlighted with a red box), 'SHOW SAVED SEARCHES', and 'EXPORT SEARCH RESULTS'. A blue arrow points to the 'Application Type' dropdown menu.

Figure 15: Advanced Search - Save Search button

2. A pop-up window appears. Enter a **Search Name** and click the **Save** button.



The screenshot shows a 'Save Search' pop-up window. It has a title bar with a close button. Inside, there is a text input field labeled 'Search Name' (highlighted with a red box) and a 'SAVE' button (also highlighted with a red box).

Figure 16: Electronic Grant File - Save Search pop-up window

3. A message appears stating that the changes are saved.



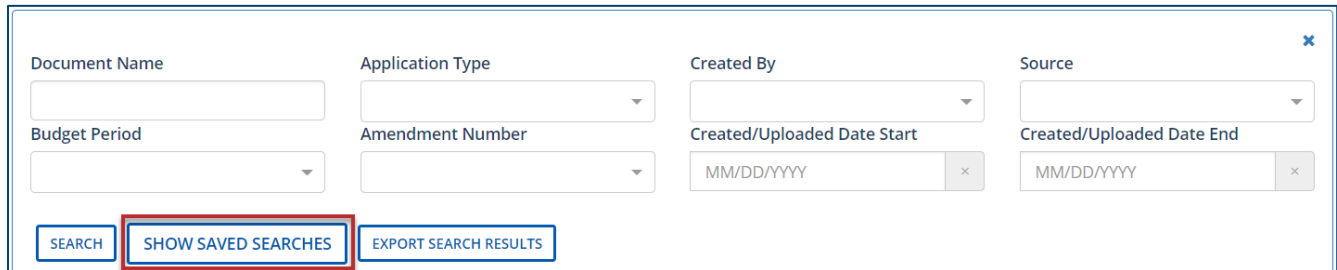
The screenshot shows the 'Save Search' pop-up window after the search has been saved. A green message box at the top says 'Saved! Saved changes.' (highlighted with a blue arrow). Below the message box is a text input field containing 'Test Search for EGF Guide' and a 'SAVE' button.

Figure 17: Save Search pop-up window - Saved message

## VIEW SAVED SEARCHES

To view previously saved searches:

1. From the *Advanced Search* section, click the **Show Saved Searches** button.



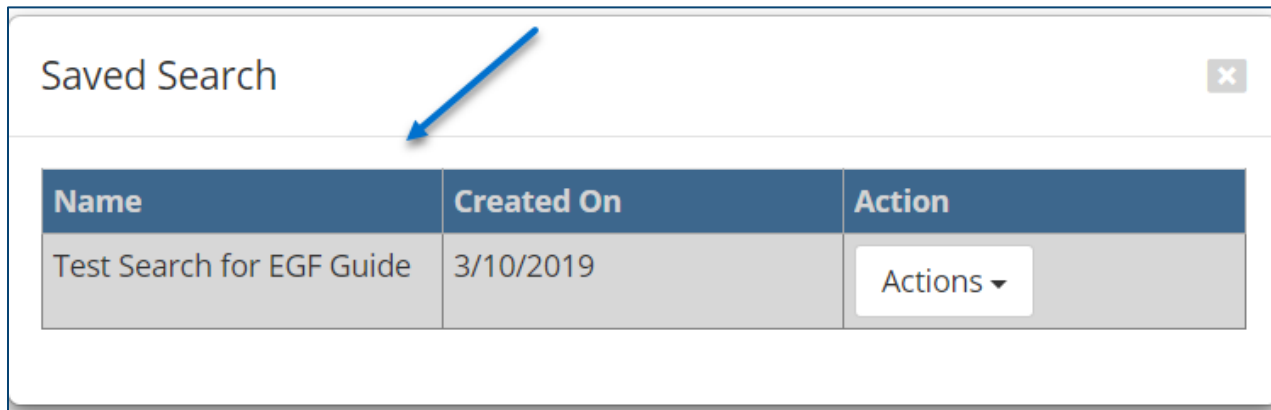
Document Name  Application Type  Created By  Source

Budget Period  Amendment Number  Created/Uploaded Date Start  Created/Uploaded Date End

SEARCH **SHOW SAVED SEARCHES** EXPORT SEARCH RESULTS

Figure 18: Electronic Grant File - Show Saved Searches button

2. A “Saved Search” pop-up window appears listing the user’s previously saved searches for a Project. The “Saved Search” window contains the *Name* of the saved search, the *Date Created*, and a drop-down list of available *Actions*.

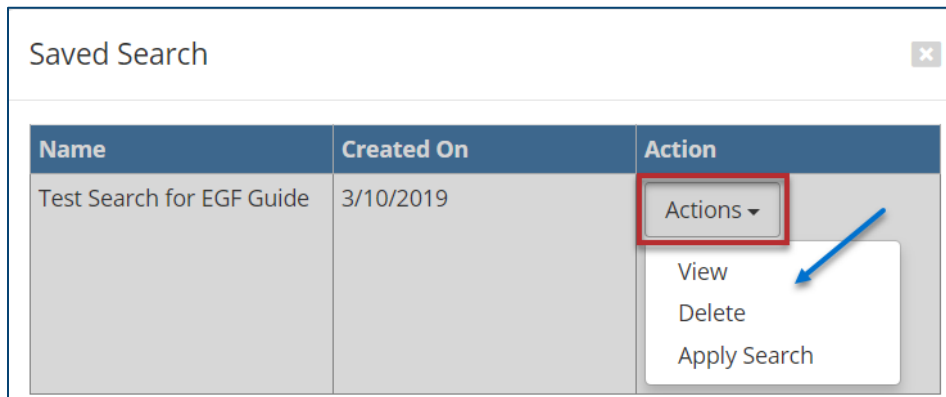


Saved Search

Name	Created On	Action
Test Search for EGF Guide	3/10/2019	Actions ▾

Figure 19: Electronic Grant File - Saved Search window

3. From the *Action* column, click the **Actions** drop-down arrow for a list of options.



Saved Search

Name	Created On	Action
Test Search for EGF Guide	3/10/2019	<div>Actions ▾</div> <div> View Delete Apply Search </div>

Figure 20: Saved Searches Window – Actions list

The *Actions* list options include:

- **View:** Click **View** to open a new window that lists the criteria used to build the search. Click the **Apply Search** button to run the search, or the **Back** button to return to the “Saved Search” window.

The screenshot shows a window titled "Saved Search" with a close button (X) in the top right corner. The main content area displays the title "Test Search for EGF Guide" and a list of search criteria: Document Name, Application Type (set to "New"), Created By, Source, Budget Period, Amendment, Created/Uploaded Date Start, and Created/Uploaded Date End. At the bottom, there are two buttons: "APPLY SEARCH" and "BACK", which are highlighted with a red rectangular box.

Figure 21: Saved Searches - View screen

- **Delete:** Remove the saved search. When **Delete** is clicked, a “Please Confirm” message appears. Click **Yes** to proceed with the delete action or click **Cancel** to return to the “Saved Search” window.

The screenshot shows a dialog box with the text "Please confirm Delete?". Below the text are two buttons: a red "Delete" button and a blue "Cancel" button.

Figure 22: Please Confirm message

- **Apply Search:** Run the search. The *Results* table updates based on the search criteria.

To close the “Saved Searches” window, click the **X** in the upper right corner of the screen.

The screenshot shows the "Saved Search" window with a close button (X) in the top right corner. Below the title bar is a table with the following data:

Name	Created On	Action
Test Search for EGF Guide	3/10/2019	Actions ▼

Figure 23: Saved Searches – Close button

## Results Table

The *Results* table is located below the *Search* section and displays the list of documents available in the Electronic Grant File.

Show 20 records per page. Page 1 of 2. Total 24 records.

« ‹ 1 2 › »





<input type="checkbox"/>	Document Name	Description	Source	Award Number	Application Type	Date Uploaded	Amendm...	Budget Period	Created By
<input type="checkbox"/>	 Notice Of Award	01-00 Annual Funding Non-Competing Continuation Remarks	Awards Processing	01-00	Non-Competing Continuation	2/26/2017	Initial Review	BP2 (2/28/2017 - 2/27/2018)	S
<input type="checkbox"/>	 Notice Of Award	01-01-00 NCN Remarks	Awards Processing	01-01-00	New	2/25/2016	Initial Review	BP1 (2/29/2016 - 2/27/2017)	J
<input type="checkbox"/>	 Notice Of Award	01-02 Balance of Funds Remarks	Awards Processing	01-02-01	Post Award Amendment	8/9/2017	1	BP2 (2/28/2017 - 2/27/2018)	S
<input type="checkbox"/>	 Notice Of Award	01-03 Annual Funding NCC Remarks	Awards Processing	01-03-00	Non-Competing Continuation	1/30/2018	Initial Review	BP3 (2/28/2018 - 2/27/2019)	S

Figure 24: Electronic Grant File - Results Table

Just above the *Results* table, click the **Show** drop-down list to select how many documents appear in the table at one time.

Show 20 records per page


<input type="checkbox"/>	Document Name
<input type="checkbox"/>	 Notice Of Award

Figure 25: Results Table - Show drop-down list

Click each **column title** to sort the *Results* table in ascending or descending order.

Show 20 records per page. Page 1 of 2. Total 24 records.

«

<

1

2

>

»

<input type="checkbox"/>	Document Name	Description	Source	Award Number	Application Type	Date Uploaded	Amendm...	Budget Period	Created By
--------------------------	---------------	-------------	--------	--------------	------------------	---------------	-----------	---------------	------------

Figure 26: Results Table – Sort Columns

The *Results* table columns are as follows:

- **Select Checkbox:** Select the **checkbox** to the left of a row to select documents to include in a PDF or Zip Extract file, or to display in a *Show Selected Documents* list.
- **Document Name:** Click the **document name** link to download the file to a computer.
- **Description:** Description of the file entered by the user that uploaded the document.
- **Source:** Either Application or Grant Notes or the Application.
- **Award Number:** Full award number, including budget period and amendment.
- **Application Type:** The type of application to which the document is associated. Application types include Competing Continuation, Direct Supplement, New, Non-Competing Continuation, and Post Award Amendment.
- **Date Uploaded:** The date the document was uploaded/added to the system.
- **Amendment #:** The amendment number to which the document is associated.
- **Budget Period:** The budget period to which the document is associated.
- **Created By:** Username of the person that added the document.

## Generate PDF Extract and Zip Extract Buttons

The *Generate PDF Extract* and *Generate Zip Extract* buttons are located toward the bottom of the screen. An extract is a group of selected documents that are saved as either one combined PDF with a table of contents, or in a Zip file.

Show	20	records per page. Page 1 of 2. Total 24 records.
<div> <div>GENERATE PDF EXTRACT</div> <div>GENERATE ZIP EXTRACT</div> </div>		

Figure 27: Electronic Grant File - Generate PDF Extract and Generate Zip Extract buttons

## GENERATE PDF EXTRACT

To create a PDF extract file, perform the following steps:

- From the *Results* table, select the checkbox to the left of each document to include in the PDF.

**Note:** When at least one document is selected, the *Show Selected Documents* button appears. Click the **Show Selected Documents** button to view a list of selections before generating an extract.

- Click the **Generate PDF Extract** button.

The screenshot shows a table with three rows of documents. Each row has a checkbox in the first column, which is highlighted with a red box. A blue arrow points from the first checkbox to the 'SHOW SELECTED DOCUMENTS' button at the bottom right. Below the table, there is a 'Show 20 records per page. Page 1 of 2. Total 24 records.' label. At the bottom, there are three buttons: 'GENERATE PDF EXTRACT' (highlighted with a red box), 'GENERATE ZIP EXTRACT', and 'SHOW SELECTED DOCUMENTS' (highlighted with a blue box).

<input checked="" type="checkbox"/>	Goal Statements 2018-19.docx	Goal Statements 2018-19.docx	Application	01-03-00	Non-Competing Continuation
<input checked="" type="checkbox"/>	Other Funding Source.pdf	Other Funding Source.pdf	Application	01-01-00	New
<input checked="" type="checkbox"/>	Application and Budget Justification Narrative - 2016-2027 grant application.pdf	Application and Budget Justification Narrative - 2016-2027 grant application.pdf	Application	01-01-00	New

Show 20 records per page. Page 1 of 2. Total 24 records.

**GENERATE PDF EXTRACT** **GENERATE ZIP EXTRACT** **SHOW SELECTED DOCUMENTS**

Figure 28: Results table checkboxes and Generate PDF Extract button

- A pop-up message appears stating “Please confirm generate PDF extract?” Click **Yes** to generate the extract. Click **No** to return to the results table.

The pop-up message box contains the text 'Please confirm generate PDF extract?' and two buttons: 'YES' (highlighted with a red box) and 'NO'.

Please confirm generate PDF extract?

**YES** **NO**

Figure 29: Electronic Grant File - Pop-up confirmation message

- A pop-up message appears with options to *Reorder Documents Sequence* or *Skip*. To reorder the selected documents, click the **Reorder Documents Sequence** button.

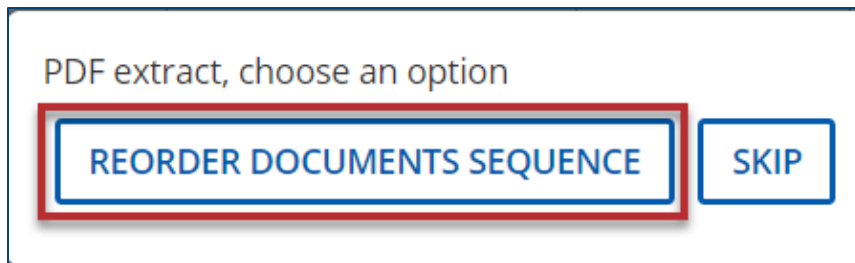


Figure 30: Generate PDF Extract - Reorder Documents Sequence

- The “Reorder Documents” screen appears in a new window. To change the order of the documents, from the *Sequence* column, click the **drop-down** to the left of a document and select the **number** that document appears in the PDF.

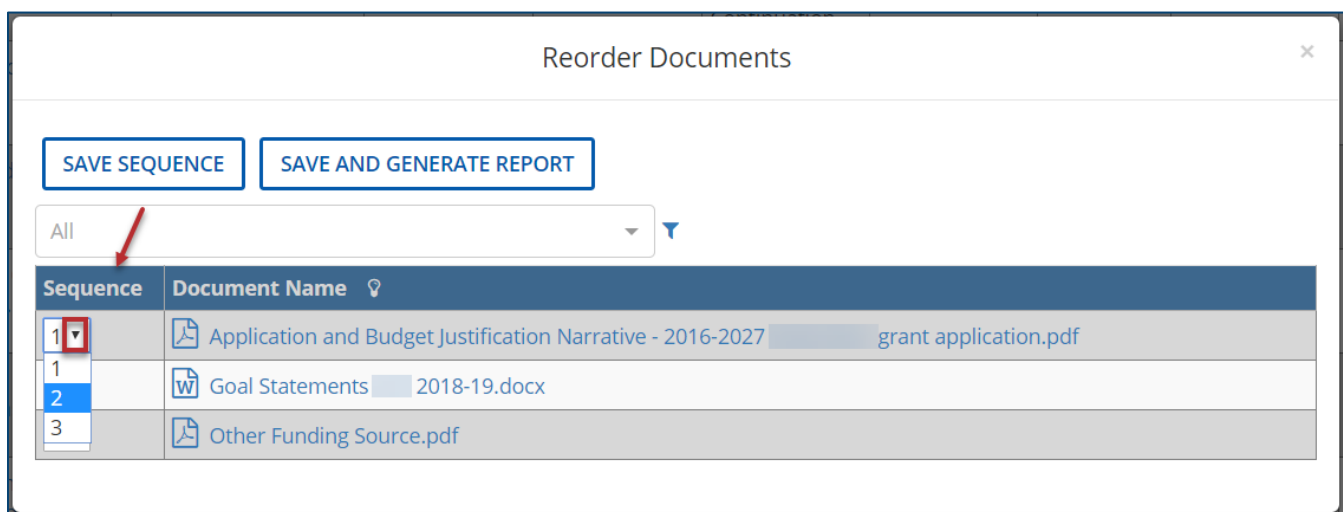


Figure 31: Reorder Documents screen - Sequence drop-down list

- The table refreshes, and the documents are reordered.

**Note:** An additional way to reorder the documents is to click and drag a **document name** link to the desired location.



10. To continue generating the extract, click the **Save and Generate Report** button.

✕

Reorder Documents

SAVE SEQUENCE    **SAVE AND GENERATE REPORT**

All ▼

Sequence	Document Name ⓘ
1 ▼	Goal Statements 2018-19.docx
2 ▼	Application and Budget Justification Narrative - 2016-2027 grant application.pdf
3 ▼	Other Funding Source.pdf

Figure 32: Reorder Documents screen - Save and Generate Report button

11. The PDF extract is available from the *Extracts* tab located towards the top of the screen.

DOCUMENTS    **EXTRACTS**    NBROWN9 ▼    🔍

Figure 33: Extracts link

## GENERATE ZIP EXTRACT

To create a Zip extract file, perform the following steps:

1. From the *Results* table, select the **checkbox** to the left of each document to include in the Zip file.
2. Click the **Generate Zip** Extract button.

<input checked="" type="checkbox"/>	Goal Statements 2018-19.docx	Goal Statements 2018-19.docx	Application	01-03-00	Non-Competing Continuation
<input checked="" type="checkbox"/>	Other Funding Source.pdf	Other Funding Source.pdf	Application	01-01-00	New
<input checked="" type="checkbox"/>	Application and Budget Justification Narrative - 2016-2027 grant application.pdf	Application and Budget Justification Narrative - 2016-2027 grant application.pdf	Application	01-01-00	New

Show 20 records per page. Page 1 of 2. Total 24 records.

GENERATE PDF EXTRACT    **GENERATE ZIP EXTRACT**    SHOW SELECTED DOCUMENTS

Figure 34: Results table checkboxes and Generate Zip Extract button

3. The “Please confirm generate extract” message appears. Click **Yes** to continue.

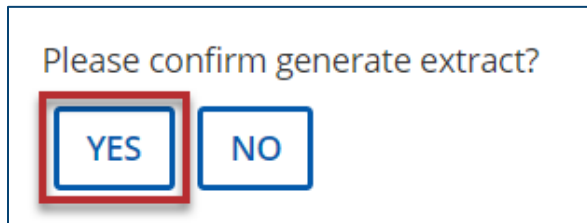


Figure 35: Electronic Grant File – Confirmation message

4. The Zip extract is available from the *Extracts* tab located towards the top of the screen.

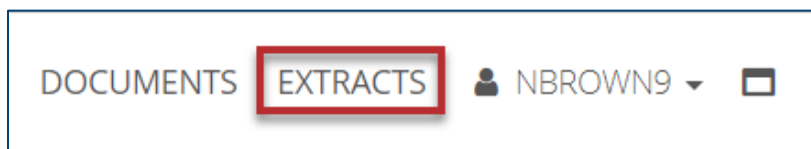


Figure 36: Extracts link

## View PDF and Zip Extracts

Select the **Extracts** tab in the top right corner of the “Electronic Grant File” screen to open the list of previously saved PDF or Zip extract files. An extract is a group of selected documents that are saved as either one combined PDF with a table of contents, or in a Zip file.



Figure 37: Electronic Grant File - Extracts

When the *Extracts* tab is selected, the “Project Extracts” screen appears. This screen contains the following information:

- **Date Created:** The date the PDF or Zip file was generated.
- **Extracts:** Click the Extract **link** to download the previously generated PDF or Zip file to your computer.
- **Documents:** Click the **Show Extract Documents** link to open a new window containing the documents included in the PDF or Zip files.

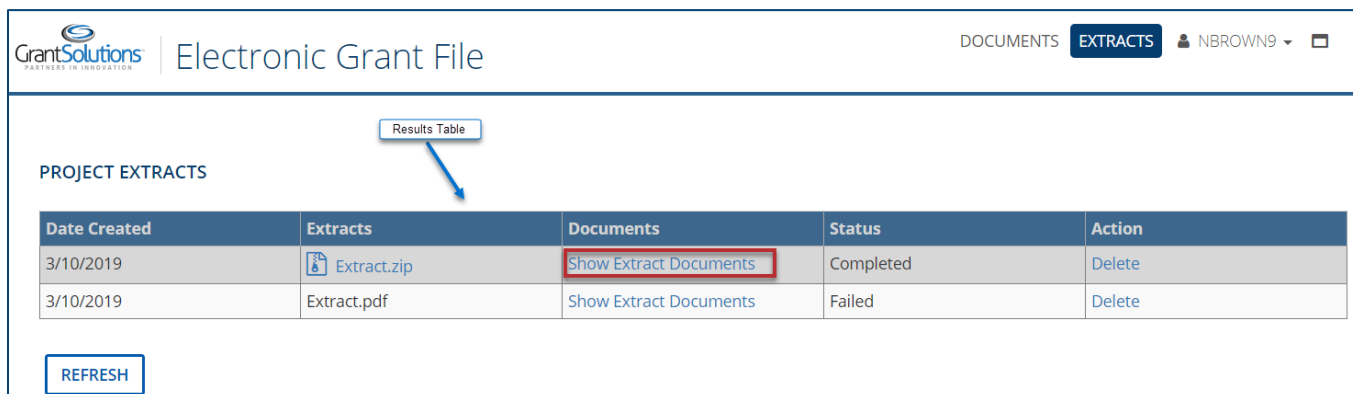


Figure 38: Project Extracts screen

- The “Extract Documents” screen appears. Click the **X** in the right corner of the screen to return to “Project Extracts”.

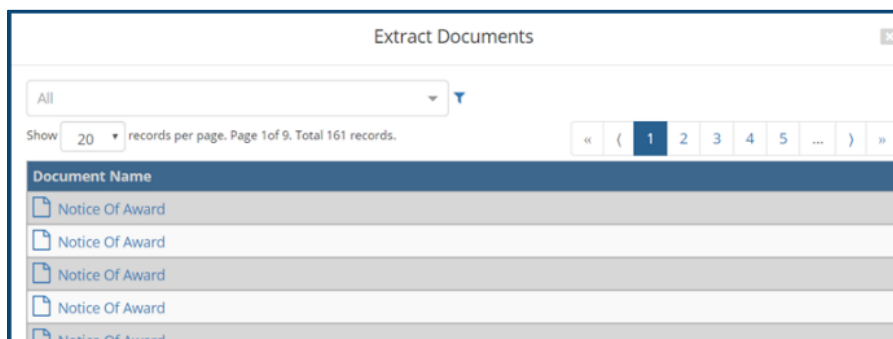


Figure 39: Extract Documents window

GrantSolutions

PARTNERS IN INNOVATION

Electronic Grant File


DOCUMENTS

EXTRACTS

NBROWN9

Results Table

PROJECT EXTRACTS

Date Created	Extracts	Documents	Status	Action
3/10/2019	 Extract.zip	Show Extract Documents	Completed	Delete
3/10/2019	Extract.pdf	Show Extract Documents	Failed	Delete

REFRESH

Figure 40: Project Extracts screen

- **Status:** Shows the *Completed* status for the Extract.
- **Actions:** Click **Delete** to remove the extract record from the “Project Extracts” screen. A pop-up message appears asking the user to confirm deleting the report.

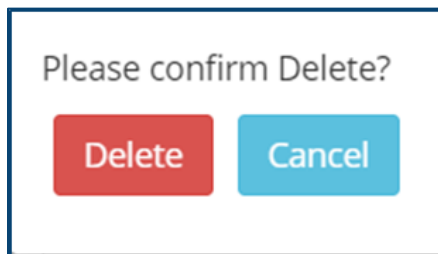





Figure 41: Please Confirm pop-up

## Download Extracts

To download previously saved PDF or Zip extract files to a computer:

1. From the *Extracts* column on the “Project Extracts” screen, click the **Extract** link.

PROJECT EXTRACTS

Date Created	Extracts	Documents	Status	Action
3/12/2019	 Extract.zip	Show Extract Documents	Completed	Delete
3/12/2019	 Extract.zip	Show Extract Documents	Completed	Delete
3/11/2019	 Extract.zip	Show Extract Documents	Completed	Delete

REFRESH

Figure 42: Project Extracts screen - Extract link

2. A message appears in the *Extracts* column stating, "Please wait downloading." The downloaded file appears at the bottom of the screen.

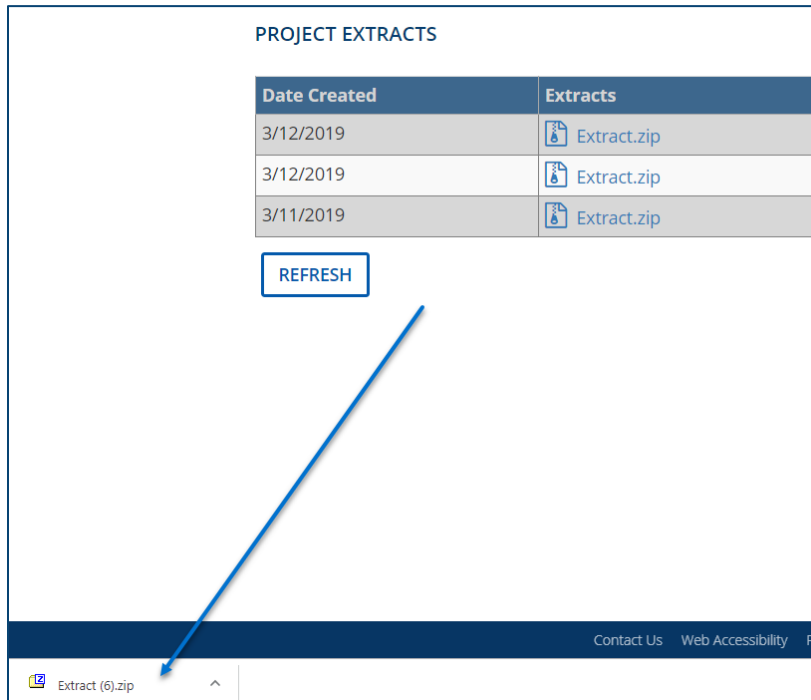


Figure 43: Project Extracts screen - File