

Grants List Screens

OBJECTIVES

At the end of this lesson, the user will be able to:

- Conduct a search using the Grants List Simple Search
- Initiate a search using the Grants List Advanced Search
- Save a search template
- Identify column and features in the Results Table

SEARCH SCREEN ICONS

Both the Simple and Advanced Search views on the Grants List screen provide additional features to make locating awarded projects easier.




Icon Name	Icon
Search Icon	
Clear/Remove Icon	
Saved Search Icon	

Table 11: Search Screen icons

Search Icon

To activate the selected or entered search criteria, click the **Search** (magnifying glass) icon.

Clear/Remove Icon

To remove all search criteria and reset the screen, click the **Clear** (eraser) icon.

Saved Searches Icon

Grantors can build and save searches in the GrantSolutions GMM to easily locate applications and awarded grants based on selected criteria. Once saved, searches are associated with the user's account (i.e., users can only view their own saved searches). Save searches are available on the following screens:

- Application Receipt and Logging
- Application Recommendation
- Award Processing
- Grants List

SIMPLE SEARCH VIEW

The “Grants List” screen Simple Search view is the first screen Grantors users arrive to in the GrantSolutions GMM (unless using the “Portal”). This screen allows users to search for awarded grants by Grant Number, Federal Award Identification Number (FAIN), or (Grant Recipient) Organization’s name.

Note: Simple and Advanced Search views, as well as search options, are also available on the “Application Receipt and Logging”, “Application Recommendation”, and “Award Processing” screens.

To conduct a search using the “Grants List” Simple Search view:

1. Log into GrantSolutions and launch GMM.

The “Grants List” screen Simple Search view displays.

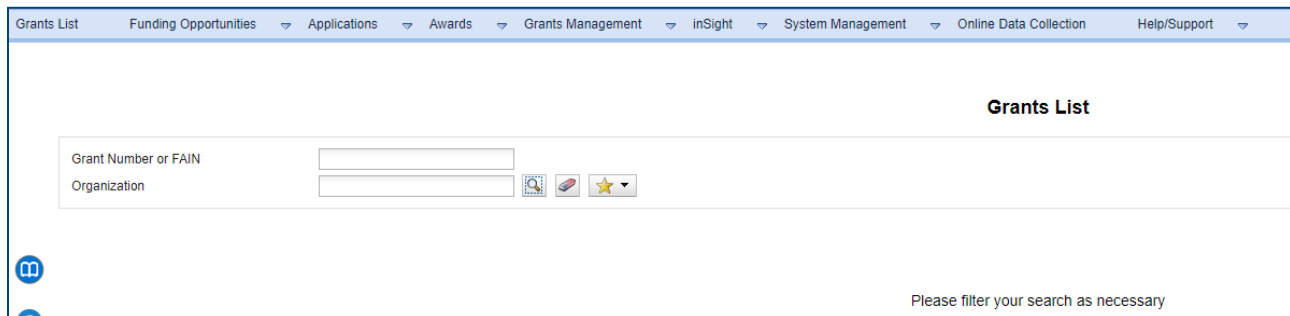


Figure 125: Grants List screen

2. Search for a single awarded Financial Assistance project by entering the **Grant Number/FAIN** or a **(Recipient) Organization’s name** in the search fields.

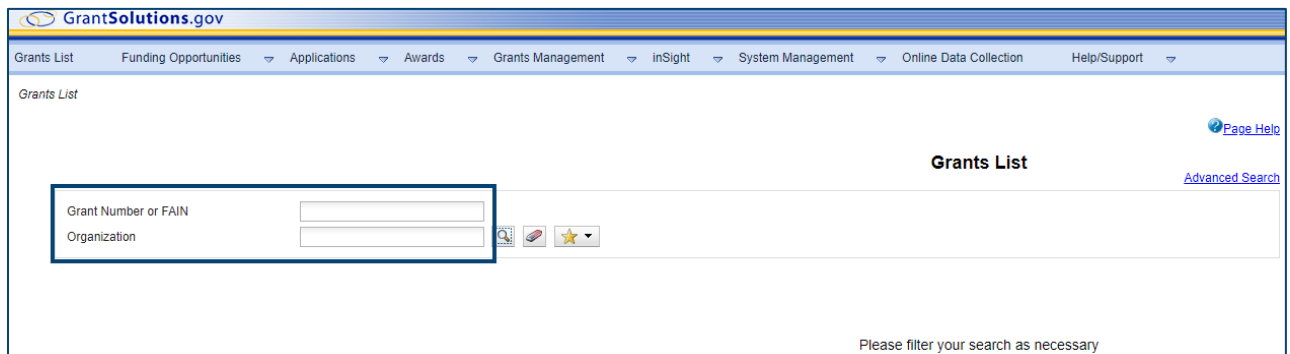


Figure 126: Grants List Screen – Grant Number/FAIN or Organization fields

Tip: To perform a partial search, enter at least three characters in the Grant Number/FAIN or a (Recipient) Organization's field.

3. To run the search:
 - a. Click the **search** icon (magnifying glass)
 - or
 - b. Press the **enter** key on a keyboard

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Grants List

Grant Number or FAIN

Organization

Please filter your search as necessary

Figure 127: Grants List Screen – Search icon

Awarded grant project(s) that meet the search criteria display in the Results table below the search fields.

Grants List

Grant Number or FAIN

918

Organization

Search within results

Search

Export Results

Hide Columns

1 - 42 of 42 items

50 | 100 | 150 | 200 | 1000

		Program Office	Grant Program	1	Grant Number	2	Organization	Project Period Start Date	3	Project Period End Date	Project Status	Actions
		Program Office			918			09/30/		02/28/	Closed	<div></div>

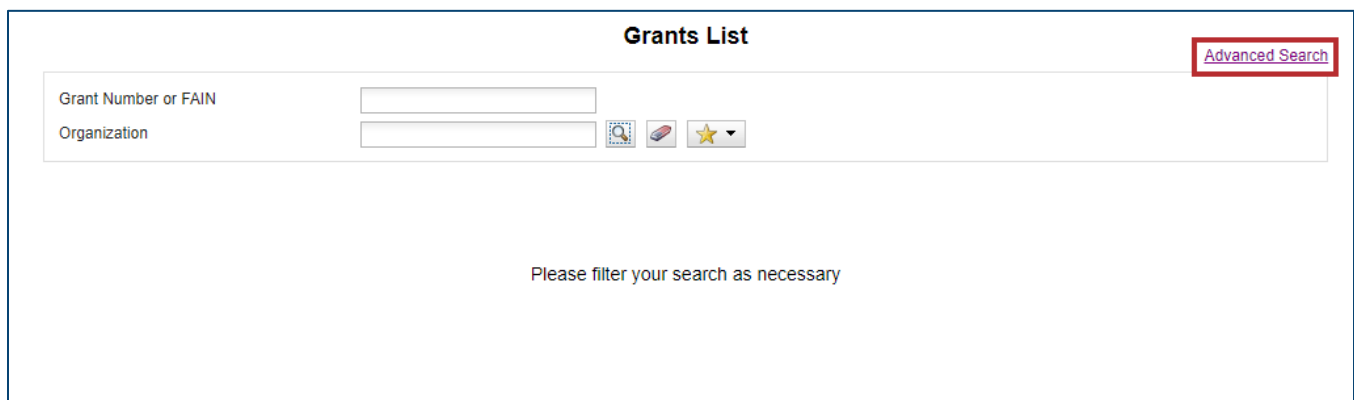
Figure 128: Grants List Screen – Results table

ADVANCED SEARCH VIEW

The *Grants List* Advanced Search screen allows a user to search for multiple awarded Financial Assistance project, or to search using additional criteria.

To conduct a search using the “Grants List” screen Advanced Search view:

1. Launch GrantSolutions GMM. The “Grants List” screen displays.
2. Click the **Advanced Search** link.



The screenshot shows the "Grants List" interface. At the top center is the title "Grants List". In the top right corner, there is a red-bordered button labeled "Advanced Search". Below the title, there is a search form with two input fields: "Grant Number or FAIN" and "Organization". To the right of these fields are three icons: a magnifying glass, a pencil, and a star with a dropdown arrow. Below the search form, the text "Please filter your search as necessary" is displayed.

Figure 129: Grants List Screen – Advanced Search hyperlink

The *Grants List* screen Advanced Search displays.

3. Click the **Search Criteria** (binoculars) icon.

Figure 130: Grants List Screen – Advanced Search view

Note: By default, the Default/Selected Search Criteria drop-down contains the required search criteria and optional filters:

- Assignment Type: My Grants
- Expired/Active: Active Projects Only

Note: Assignment Type and Expired/Active criteria are required, and only the filters can be changed. Below are the filters for each required search criteria available for selection with a definition.

Assignment Type options:

- My Primary Grants – Financial Assistance projects assigned to the user with a Primary assignment
- My Grants – Financial Assistance projects assigned to the user
- All Grants – Financial Assistance projects associated with the user’s virtual office assignment

Expired/Active options:

- Active Projects Only – Financial Assistance projects where the Project Period End Date has not passed
- Expired Projects, Not Closed – Financial Assistance projects where the Project Period End Date has passed, but the project is open
- Include Expired Projects – All active and expired Financial Assistance projects

4. Select from the drop-down list a search criterion.

Once selected, the search criterion name displays to the left of the Search Criteria icon (binoculars).

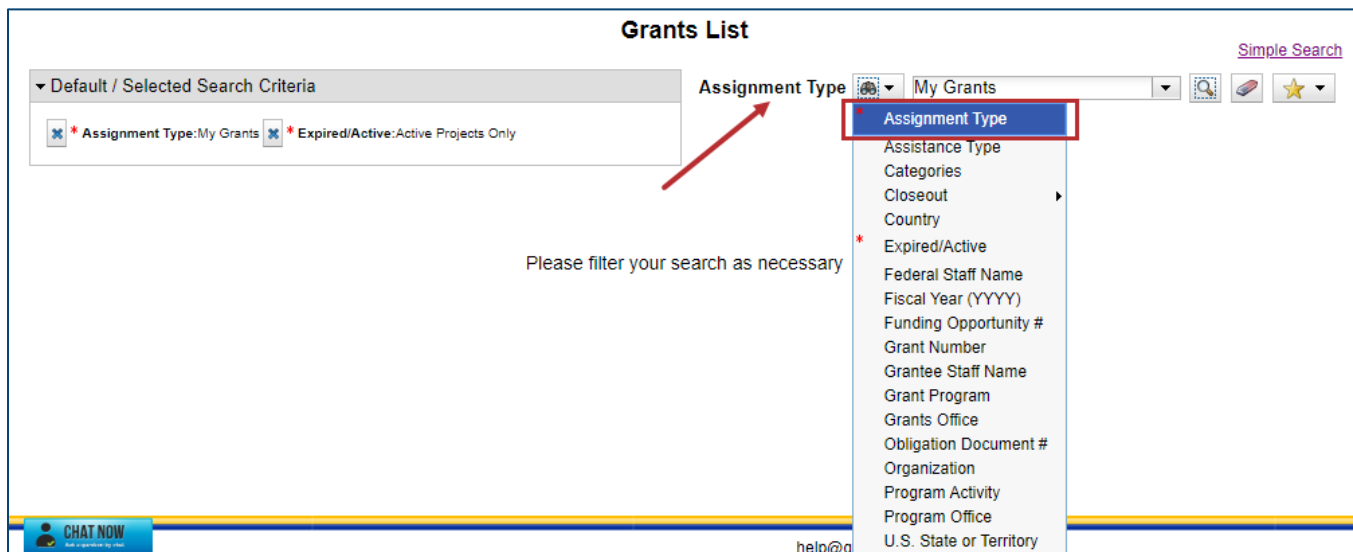


Figure 131: Grants List screen – Search Criteria drop-down list

Note: Based on the search criteria selected, the drop-down list to the right is populated with possible filters, a calendar widget, or a text box to enter search information.

5. Click the **drop-down arrow** to select a filter.

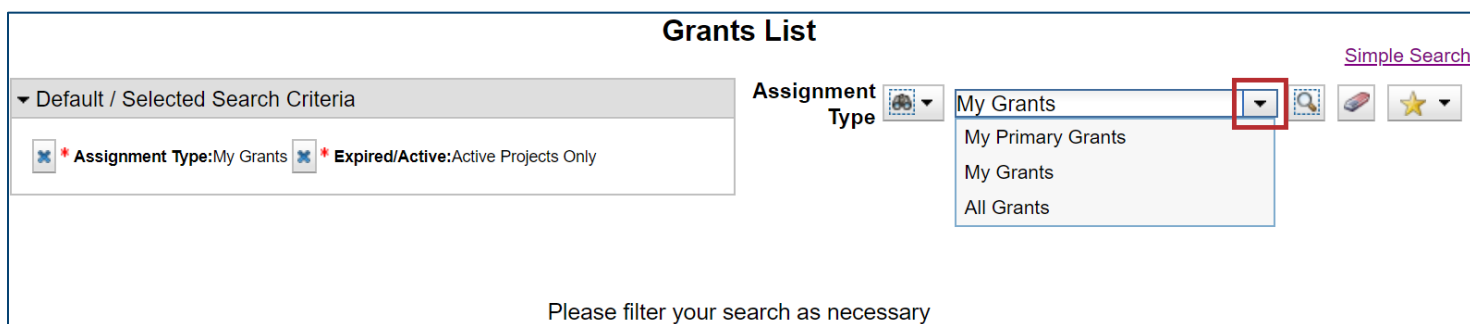


Figure 132: Grants List Screen – Filter drop-down list

Note: Once a value is selected or entered, it displays in the Default/Selected Search Criteria drop-down.

The screenshot shows the 'Grants List' interface. At the top right is a 'Simple Search' link. Below it is a 'Default / Selected Search Criteria' dropdown menu. To the right of this menu are two input fields: 'Assignment Type' with a dropdown arrow and 'All Grants' with a dropdown arrow. Below the search criteria menu, there is a list of criteria: 'Expired/Active:Active Projects Only' and 'Assignment Type:All Grants'. A red arrow points to the 'Assignment Type:All Grants' criterion. At the bottom of the screen, it says 'Please filter your search as necessary'.

Figure 133: Grants List Screen – Added Search Criterion

Note: Turn off Default/Selected Search Criteria (that is not required) by clicking the **remove** (x) icon. However, required filters (indicated by the red asterisks to the left of the filter) may only be changed, not removed.

The screenshot shows the 'Grants List' interface. At the top right is a 'Simple Search' link. Below it is a 'Default / Selected Search Criteria' dropdown menu. To the right of this menu are two input fields: 'Fiscal Year (YYYY)' with a dropdown arrow and '2020' with a dropdown arrow. Below the search criteria menu, there is a list of criteria: 'Expired/Active:Active Projects Only', 'Assignment Type:All Grants', and 'Fiscal Year (YYYY):2020'. A red box highlights the 'remove' (x) icon next to the 'Fiscal Year (YYYY):2020' criterion. At the bottom of the screen, it says 'Please filter your search as necessary'.

Figure 134: Grants List Screen – Remove icon

Note: Below is a list of the available Search Criterion and Filter descriptions used on the *Grants List* screen:

Search Criteria	Description/Filters
Assignment Type	<ul style="list-style-type: none"> • My Primary Grants • My Grants • All Grants
Assistance Type	<ul style="list-style-type: none"> • Block Grant • Cooperative Agreement • Direct Loan

	<ul style="list-style-type: none"> • Direct Payment for Specified Use, as a Subsidy or Other • Direct Payment with Unrestricted Use • Formula Grant • Guaranteed/Insured Loan • Insurance • Other Reimbursable, Contingent, Intangible, or Indirect • Project Grant • Specified Direct Payment
(Project) Categories	Select a category from the drop-down list. The categories available for selection depend on a user's Grant Program assignments
Closeout	<ul style="list-style-type: none"> • Closeout Type <ul style="list-style-type: none"> ○ All Closed ○ Marked as Closed ○ Ready to Close • Closed After Date – Calendar widget • Will Expire In <ul style="list-style-type: none"> ○ 30 Days ○ 60 Days ○ 90 Days
Country	Enter/Select a country
Expired/Active	<ul style="list-style-type: none"> • Active Projects Only • Expired Projects, Not Closed • Include Expired Projects
Federal Staff Name	Enter the name as text
Fiscal Year (YYYY)	Enter/Select the fiscal year from the drop-down list
Funding Opportunity #	Enter/Select the Funding Opportunity Number from the drop-down list
Grant Number	Enter grant number as text
Recipient Staff Name	Enter a Recipient staff's name
Grant Program	Select Grant Program
Grants Office	Select the Grants Office
Obligation Document #	Enter Obligation Document number
Organization	Enter Recipient Organization's name

Program Activity	Select the Program Activity
Program Office	Select the Program Office
U.S State or Territory	Select the State or Territory

Table 12: Search Criterion and Filter Descriptions

Optional: Follow steps 3-5 to add additional criteria to drill down the results further.

- Click the **Search** icon (magnifying glass) or enter button from the keyboard to activate the search.

The screenshot shows the 'Grants List' interface. On the left, there is a section titled 'Default / Selected Search Criteria' containing two filter buttons: 'Expired/Active:Active Projects Only' and 'Assignment Type:All Grants'. To the right, there is an 'Assignment Type' dropdown menu currently set to 'All Grants'. Further right is a search bar with a magnifying glass icon (the search button) highlighted by a red square. To the right of the search bar are icons for a pencil (edit), a star (favorites), and a dropdown arrow. Above the search bar, the text 'Simple Search' is visible. At the bottom of the interface, a message reads 'Please filter your search as necessary'.

Figure 135: Grants List Screen – Search button

The screen refreshes with results matching the search criteria display in a table.

Grants List

▼ Default / Selected Search Criteria

☒ Expired/Active: Active Projects Only ☒ Assignment Type: All Grants

Assignment Type All Grants

[Simple Search](#)

Search within results

1 - 50 of 111 items 50 | 100 | 150 | 200 | 1000

	Program Office	Grant Program	1 ▲	Grant Number 2 ▲	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input type="checkbox"/>						05/01/2007	09/30/2020	Amendment Approved (Processing)	
<input type="checkbox"/>						05/01/2007	09/30/2020	Submitted (Post Award)	
<input type="checkbox"/>						05/01/2007	09/30/2020	Submitted (Post Award)	
<input type="checkbox"/>						05/01/2007	09/30/2020	No Amendments In-Progress	
<input type="checkbox"/>						05/01/2007	09/30/2020	Submitted (Post Award)	

Legend

View NGA View JAWS NGA Project Assignments Grant Notes Manage Amendments History Electronic Grant File Funding Restrictions

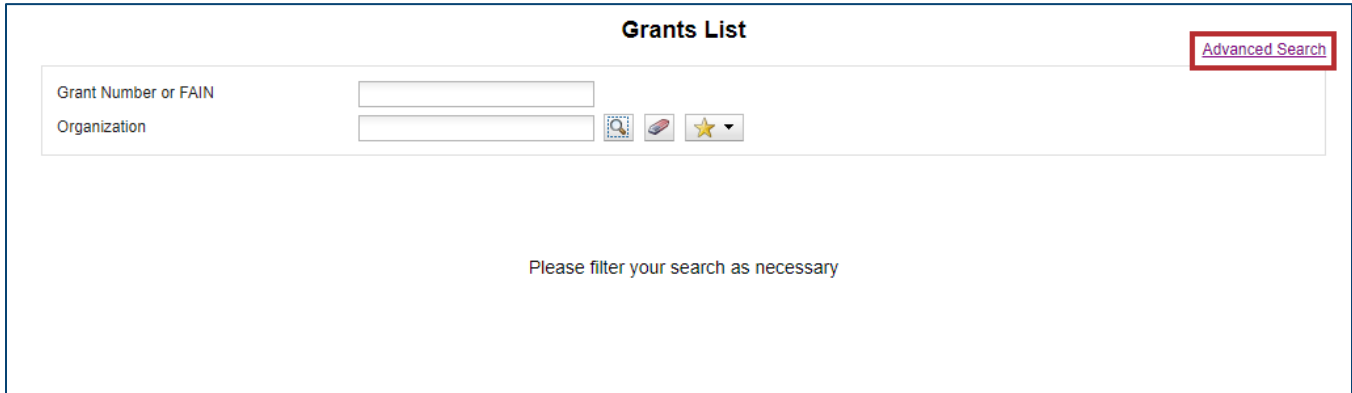
Figure 136: Grants List Screen – Results table

Note: The Bulk action buttons, and the icon Legend reside below the Result table. On the “Grants List” screen, the *Add Bulk Note* (to add one note to multiple awarded projects) and *Manage Assignments* (select the same project assignments to multiple awarded Financial Assistance projects) are available.

SAVE A SEARCH

To create a Saved Search:

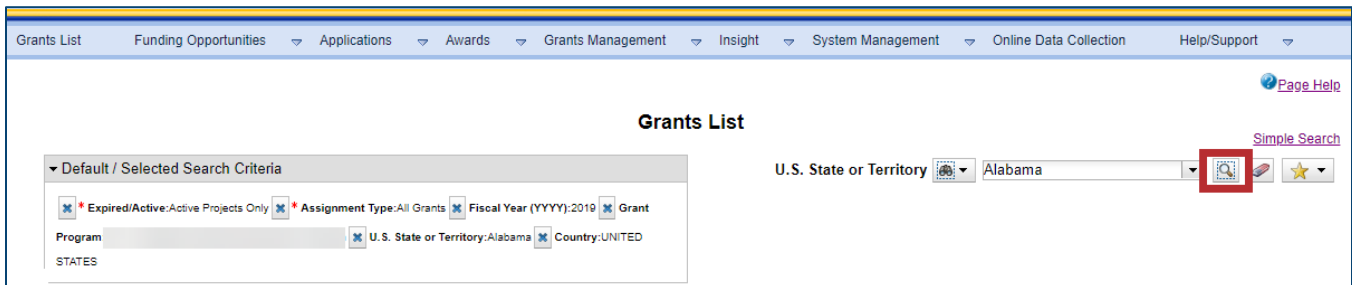
1. From the “Grants List” screen (or any of the screens listed above), click the **Advanced Search** link.



The screenshot shows the 'Grants List' screen. At the top right, there is a link labeled 'Advanced Search' which is highlighted with a red rectangular box. Below this, there are input fields for 'Grant Number or FAIN' and 'Organization'. To the right of these fields are three icons: a magnifying glass, a pencil, and a star. Below the input fields, the text 'Please filter your search as necessary' is displayed.

Figure 137: Grants List Screen – Advanced Search link

2. Follow steps 3-6 above from the Advanced Search view to add search criteria.
3. Click the **Search** icon (magnifying glass) to activate the search.



The screenshot shows the 'Grants List' screen with search criteria applied. On the left, under 'Default / Selected Search Criteria', there are several filters: 'Expired/Active:Active Projects Only', 'Assignment Type:All Grants', 'Fiscal Year (YYYY):2019', and 'Grant'. Below these, there are fields for 'Program' (with 'STATES' entered) and 'U.S. State or Territory:Alabama', and 'Country:UNITED STATES'. On the right, there is a dropdown menu for 'U.S. State or Territory' with 'Alabama' selected. To the right of this dropdown is a magnifying glass icon, which is highlighted with a red rectangular box. Further right are icons for a pencil and a star. At the top right, there is a 'Page Help' link and a 'Simple Search' link.

Figure 138: Advanced Search

- Once search results display, click the **Saved Search** icon (star) to save the search that was run.

Grants List

U.S. State or Territory: Alabama

Simple Search

Default / Selected Search Criteria

- * Expired/Active: Active Projects Only
- * Assignment Type: All Grants
- Fiscal Year (YYYY): 2019
- Grant Program:
- Country: UNITED STATES
- U.S. State or Territory: Alabama

Search within results | Search | Export Results | Hide Columns

1 - 1 of 1 item

Program Office	Grant Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
			03/21/2016	10/23/2020	Multiple Amendments In-Progress	

Figure 139: Grants List Screen – Saved Search icon

Note: Save a search to use in the future. The search is saved to a user's profile.

- The **Saved Searches** drop-down list displays. Enter a **Name** in the **Save New Search** field.
- Click the **Add** icon (plus sign) to add this name to the Saved Searches list.

Grants List

U.S. State or Territory: Alabama

Simple Search

Default / Selected Search Criteria

- * Expired/Active: Active Projects Only
- * Assignment Type: All Grants
- Fiscal Year (YYYY): 2019
- Grant Program:
- Country: UNITED STATES
- U.S. State or Territory: Alabama

Search within results | Search | Export Results | Hide Columns

1 - 1 of 1 item

Program Office	Grant Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
			03/21/2016	10/23/2020	Multiple Amendments In-Progress	

Saved Searches

- DreaDay9
- Theone&only
- Save new search

Figure 140: Grants List Screen – Save New Search field

7. Click the **Saved Search** icon to re-open the Saved Search drop-down list.

The screenshot shows the 'Grants List' interface. At the top, there's a 'Simple Search' link. Below it, a search bar contains 'U.S. State or Territory' with a dropdown arrow and 'Alabama'. To the right of the search bar is a star icon with a dropdown arrow, which is highlighted with a red box. Below the search bar, there's a table with columns: 'Project Period Start Date', 'Project Period End Date', 'Project Status', and 'Actions'. The table has a header row and one data row. The 'Project Period Start Date' column has a value of '200' and a link to '1000'. The 'Project Period End Date' column has a value of '1'. The 'Project Status' column has a value of '1'. The 'Actions' column has a value of '1'.

Figure 141: Grants List Screen – Saved Search drop-down icon

Note: The *Saved New Search* message displays as well as the name of the new search displays under the Saved Searches list as a link.

The screenshot shows the 'Grants List' interface with the 'Saved Searches' dropdown menu open. The dropdown menu lists three saved searches: 'DreaDay9', 'Theone&only', and 'ItsANewDay'. A red arrow points to 'ItsANewDay'. To the right of each search name is a small icon of a document with a red 'X' next to it. Below the list is a text input field with the placeholder 'Save new search' and a plus icon. To the right of the input field is a message bubble icon and the text 'Saved new search'.

Figure 142: Grants List Screen – Name of Saved Search and Saved New search message

Note: Once saved, saved search names are available for selection from the star icon on both the Simple and Advanced Search views. Select a saved search name to run the search.

Tip: To remove a saved search, click the **delete** icon (X).

Tip: To make changes to a saved search:

1. Alter the search filters by removing clicking the **Remove** (x) icon or add a new search criterion in the Default/Selected Search Criteria box.

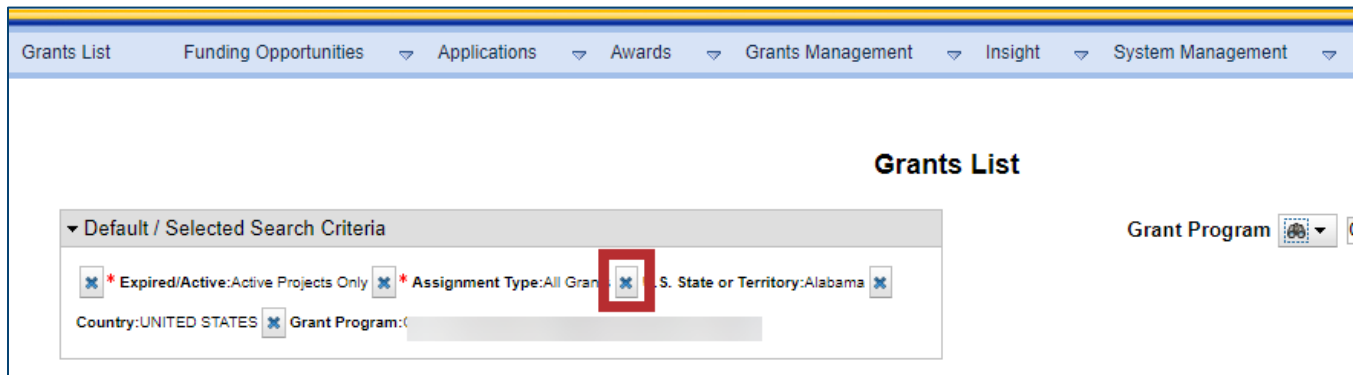


Figure 143: Advanced Search screen - delete search criteria icon

2. Click the **Saved Searches** icon.
3. Click the **Save** icon (diskette) to update the search.

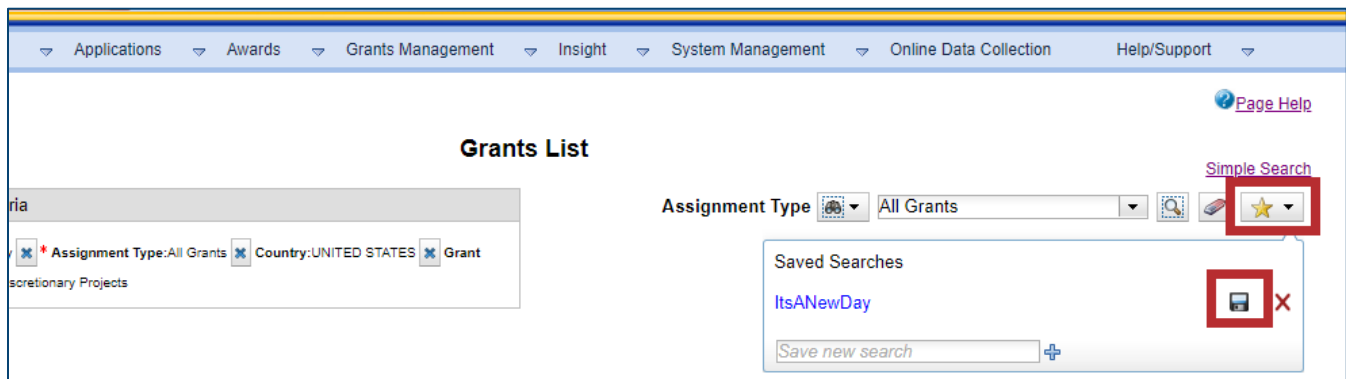


Figure 144: Advanced Search screen - Saved Searches diskette icon

The saved search is now updated with the new or removed criteria.

To run a Saved Search:

1. On the “Grants List” screen from the Simple or Advanced Search view, click the **Save Search** drop-down arrow icon.
2. Saved Searches list displays. Select the **Saved Search Name** link.

The screenshot shows the 'Grants List' header with a search bar containing 'Grant Number or FAIN' and 'Organization'. A star icon with a dropdown arrow is highlighted with a red box. A dropdown menu is open, titled 'Saved Searches', listing three saved searches: 'DreaDay9', 'ItsANewDay', and 'Theone&only'. Each search has a small icon and a red 'X' to the right. At the bottom of the menu is a 'Save new search' button with a plus icon.

Figure 145: Grants List Screen – Saved Search

Upon selection, the system generates results based on the search criteria.

The screenshot shows the 'Grants List' header with search filters. Below the header is a table with 10 columns: Program Office, Grant Program, Grant Number, Organization, Project Period Start Date, Project Period End Date, Project Status, and Actions. The first row shows a search result for Grant Number 918, with status 'Closed'. The table is paginated, showing 1 - 42 of 42 items.

Program Office	Grant Program	Grant Number	Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
Program Office		918		09/30/	02/28/	Closed	

Figure 146: Grants List Screen – Results table

RESULTS TABLE BUTTONS

Search Within Results

After running a search, the user can search within the results. This tool allows a user to find words/numbers or phrases quickly.

To search within the Results table:

1. After running a search, enter **characters** in the Search Within Results field.
2. Click the **Search** button.

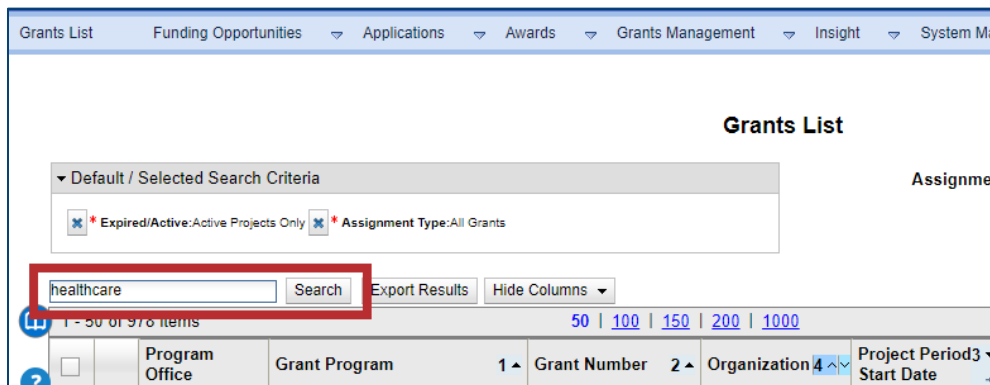


Figure 147: Grants List Screen – Search Within Results

The results table jumps to the row containing matching text.

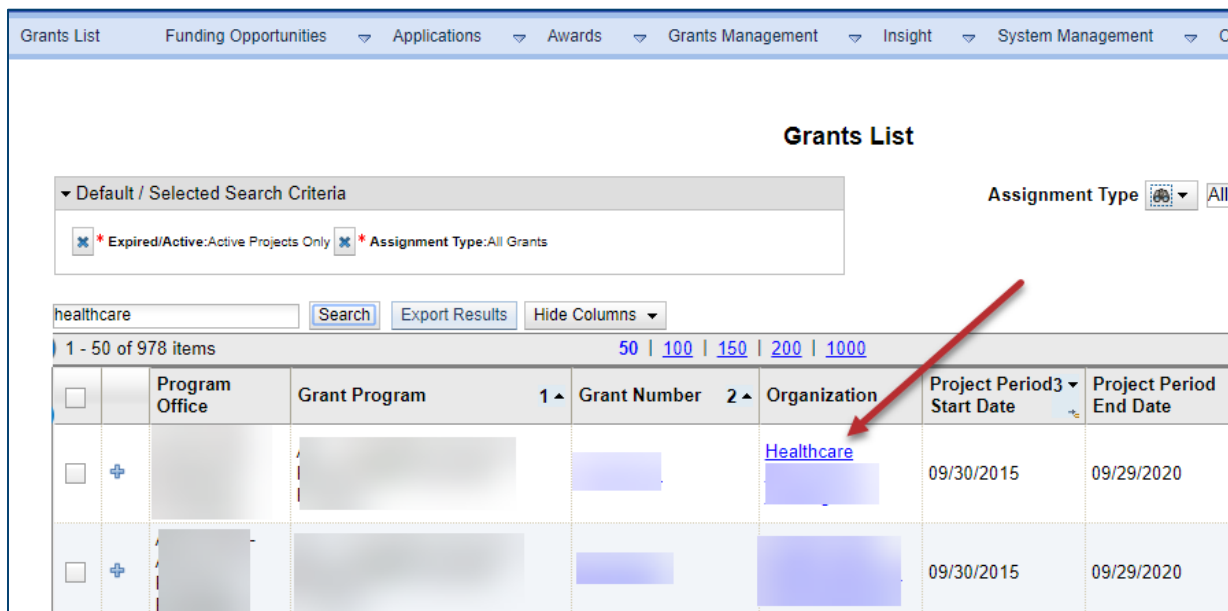


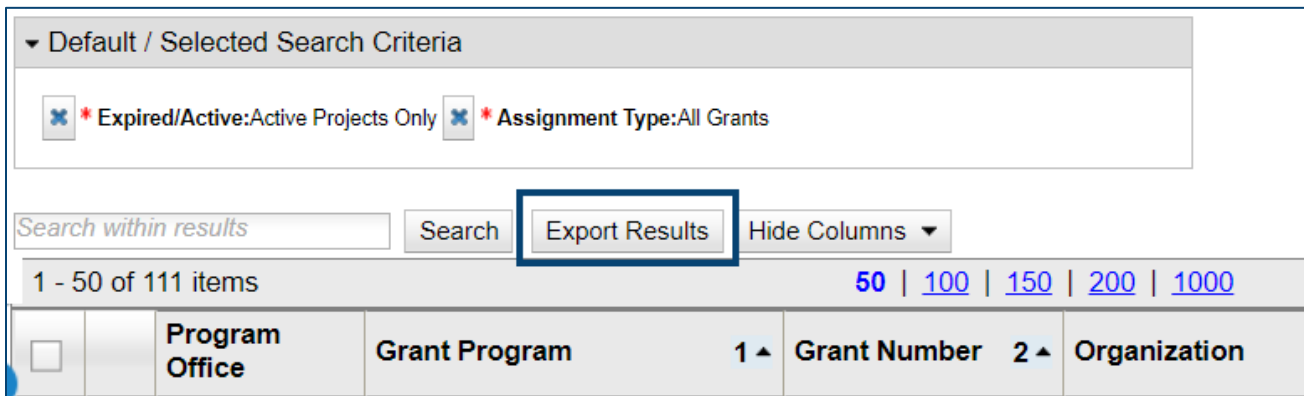
Figure 148: Grants List Screen – Result

Export Results

After running a search, the user can export search results to an Excel workbook.

To export search results:

1. After running a search, click the **Export Results** button.



The screenshot shows the Grants List Screen interface. At the top, there is a section titled "Default / Selected Search Criteria" with two filters: "Expired/Active:Active Projects Only" and "Assignment Type:All Grants". Below this is a search bar with the placeholder text "Search within results", a "Search" button, and a highlighted "Export Results" button. To the right of the "Export Results" button is a "Hide Columns" dropdown menu. Below the search bar, it indicates "1 - 50 of 111 items" and provides pagination links: "50 | 100 | 150 | 200 | 1000". At the bottom, there is a table header with columns: "Program Office", "Grant Program", "Grant Number", and "Organization".

Figure 149: Grants List Screen – Export Results button

2. A message displays in a window asking whether to **Open** or **Save** the Excel Workbook. Choose the desired option.

Save or open the excel spreadsheet.

Hide Columns

The *Grants List Results* table contains columns with useful information. However, users may hide unnecessary columns.

To minimize the number of visible columns:

1. After running a search, click the **Hide Columns** drop-down.

A drop-down menu displays.

2. Select/De-select available column names from the Hide Columns drop-down list.

Note: Greyed out column names cannot be removed from the Results table.

The screenshot shows the Grants List Screen interface. At the top, there's a search bar with "Default / Selected Search Criteria" and "Assignment Type" dropdowns. Below the search bar, there are filters for "Expired/Active: Active Projects Only" and "Assignment Type: All Grants". The main table displays search results with columns: Program Office, Grant Program, Organization, Project Period 3 Start Date, and Project Period End Date. A "Hide Columns" drop-down menu is open, showing a list of columns with checkboxes to select or deselect them. The "Hide All" option is selected. The table shows 1 - 50 of 111 items.

Program Office	Grant Program	Organization	Project Period 3 Start Date	Project Period End Date
<input type="checkbox"/>				
<input type="checkbox"/>			05/01/2007	09/30/2020
<input type="checkbox"/>			05/01/2007	09/30/2020
<input type="checkbox"/>			05/01/2007	09/30/2020

Figure 150: Grants List Screen – Hide Columns drop-down

The screen refreshes, with the columns hidden.

Tip: When the user conducts a new search, any previously hidden columns reappear.

Note: To hide the column consistently:

1. Select/De-select desired **column names** checkbox(es).
2. Click the Update Default Columns button.

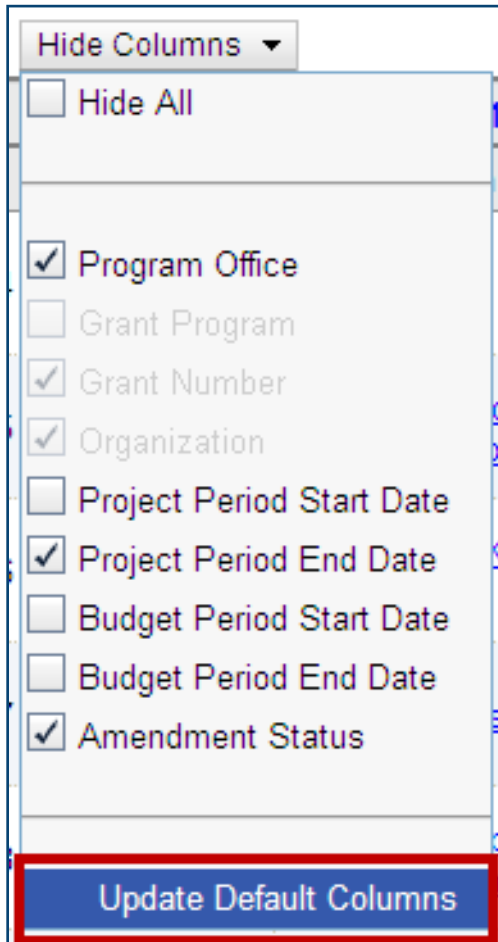


Figure 151: Grants List Screen – Update Default Columns button

The default columns update. When a user logs back into GrantSolutions GMM, the new default columns will display.

Results Table Columns

The “Grants List” screen Results table contains the following columns by default:

- Checkboxes: Select multiple awarded Financial Assistance projects to perform Notes and Project Assignments in bulk
- View Details (plus sign icon): Click to expand the awarded project row to view additional information and actions. (A user’s role determines what actions links can be seen or performed).
- Program Office: Name of the Program Office
- Grant Number: System-generated Grant Number
- Organization: The Recipient Organization’s name link opens the *Organization Information* screen in a new window
- Project Period Start Date: Start date of the project period
- Project Period End Date: End date of the project period
- Project Status: Tracks the status of Amendment applications. When no Amendments are currently in progress, the status is No Amendments in Progress. Additionally, Closed displays once a project is closed in GrantSolutions GMM

Actions: Links to Grants List actions

Search within results

Search

Export Results

Hide Columns

1 - 50 of 4444 items

50 | 100 | 150 | 200 | 1000

1

2

3

4

5

	Program Office	Grant Program	1	Grant Numbe2	Organization	Project Period Sta Date	3	Project Period End Date	Project Status	Actions
<input type="checkbox"/>		Collaboration		01		09/30/1996		06/30/2025	Multiple Amendments In-Progress	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>

Figure 152: Grants List Screen – Results Table