

QUICK SHEET: PROJECT CATEGORIES

AUDIENCE: FEDERAL STAFF AND CONTRACTORS

INTRODUCTION

In the GrantSolutions Grants Management Services (GMM), Project Categories are pre-defined labels that can be associated with an application or a grant project for filtering and reporting purposes.

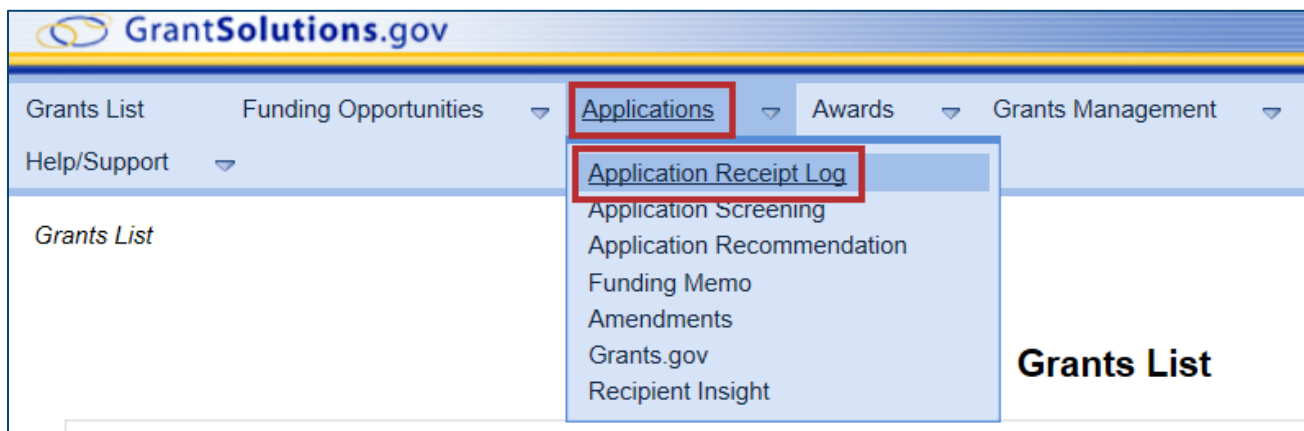
This Quick Sheet provides step-by-step instructions for assigning categories and searching for applications and grant projects by category.

ASSIGN CATEGORIES TO APPLICATIONS

To assign categories to applications during the application review process, perform the following steps:

Note: For Login information and instructions, please view the GrantSolutions Login Quick Sheet.

1. From the GMM menu bar, select the **Applications** menu drop-down and click the **Application Receipt Log** option.



- The "Application Receipt and Logging" screen appears. From the *Simple* or *Advanced Search* screen, enter search criteria in one or more search fields and click the **Search** icon.

Application Receipt and Logging

Application Number

Grant Number or FAIR

Organization

[Advanced Search](#)

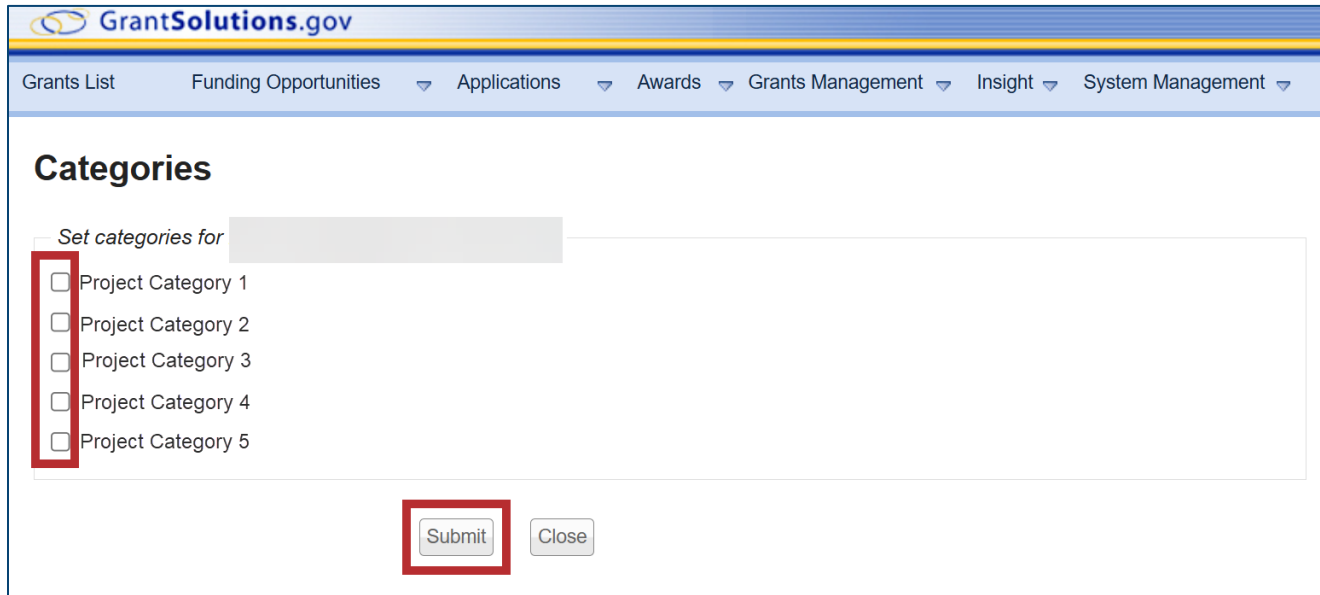
- The screen refreshes, and applications matching the search criteria populate in the table below. Click the **View Details** icon to expand the row.

Search within results					Search	Export Results	Hide Columns ▾
1 - 11 of 11 items							
<input type="checkbox"/>		Submission Date	Application #	Application Type			
<input type="checkbox"/>		09/14/2018 12:00:00 AM	1 <input style="width: 50px;" type="text"/> 01	New			

- The row expands. From the *Other Actions* field, click the **Categories** icon.

Search within results					Search	Export Results	Hide Columns ▾
1 - 5 of 5 items							50 100
<input type="checkbox"/>		Submission Date	Application #	Application Type			
<input type="checkbox"/>		05/17/2018 10:09:16 AM	<input style="width: 50px;" type="text"/> 13	New			
		<p>Other Actions: </p> <p>Program: <input style="width: 100px;" type="text"/></p> <p>Service Area: Central Office</p> <p>Due Date: 06/29/2018</p> <p>Intake Review: Eligible</p> <p>Business Review Complete: Yes</p> <p>Funding Memo Status: Approved</p> <p>Submission Date: 05/17/2018 10:09:16 AM Eastern Daylight Time</p>					

6. The "Categories" screen appears. Select one or more **categories** checkboxes to assign to an application.
7. Scroll to the bottom of the screen to click the **Submit** button to save the selected project categories to the application.



GrantSolutions.gov

Grants List Funding Opportunities Applications Awards Grants Management Insight System Management

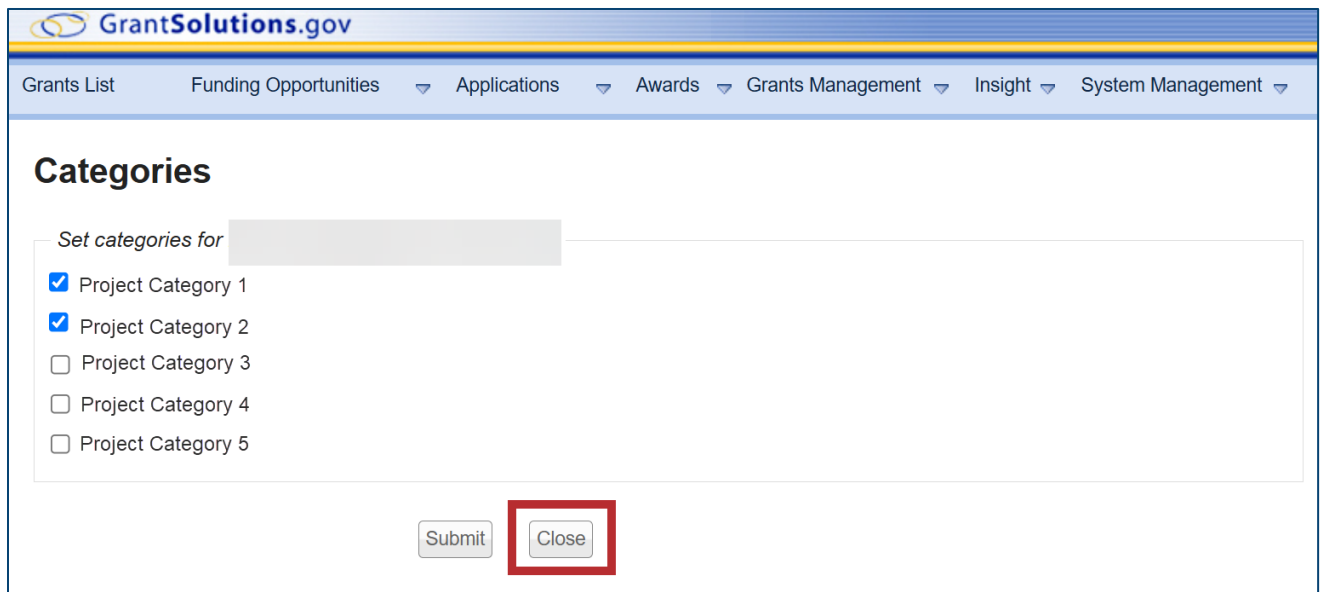
Categories

Set categories for

- ☐ Project Category 1
- ☐ Project Category 2
- ☐ Project Category 3
- ☐ Project Category 4
- ☐ Project Category 5

Submit Close

8. Click the **Close** button to return to the "Application Receipt and Logging" screen.



GrantSolutions.gov

Grants List Funding Opportunities Applications Awards Grants Management Insight System Management



Categories

Set categories for

- ☒ Project Category 1
- ☒ Project Category 2
- ☐ Project Category 3
- ☐ Project Category 4
- ☐ Project Category 5

Submit Close

The "Application Receipt and Logging" screen appears. The categories are now visible in the *Categories* field of the View Details row.

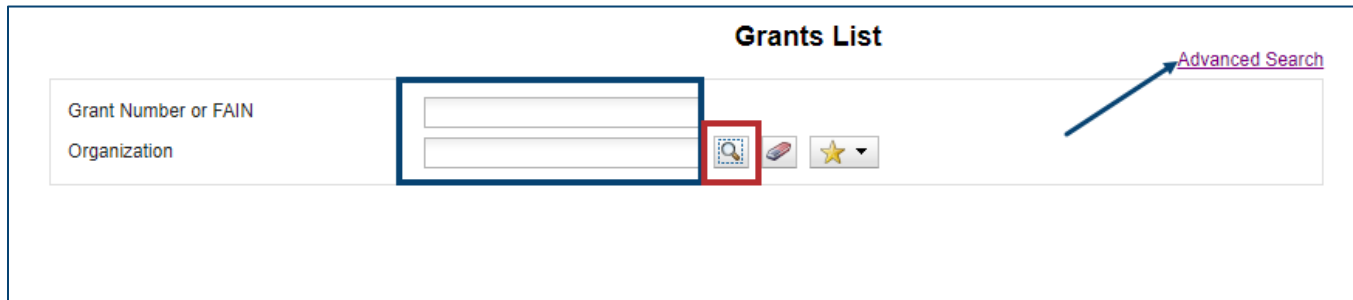
1 - 50 of 129681 items									
50 100 150 200 1000									
	Submission Date	Application #	Application Type	Announcement	Grant Program	Organization	Budget Period End Date	Application Status	Actions
<input type="checkbox"/>	10/11/2023 02:06:43 PM		New				N/A	Review in Progress	
<div> <div>Other Actions: </div> <div> <div>Grant Number: <input type="text"/></div> <div>FAIN: <input type="text"/></div> <div>Organization (Application): <input type="text"/></div> <div>Categories: Project Category 1 Project Category 2</div> </div> </div> <div> <div>Program: <input type="text"/></div> <div>Service Area: <input type="text"/></div> <div>Due Date: <input type="text"/></div> <div>Intake Review: Eligible</div> <div>Business Review Complete: Yes</div> <div>Funding Memo Status: Complete</div> <div>Submission Date: 10/11/2023 02:06:43 PM Eastern Daylight Time</div> </div>									

ASSIGN CATEGORIES TO AWARDED GRANTS

To assign categories to awarded grant projects, complete the following steps:



Note: For Login information and instructions, please view the GrantSolutions Login Quick Sheet.

1. The "Grants List" screen appears. Use the *Simple* or *Advanced Search* screens to locate one or more awarded grant projects and click the **Search** icon.











The screenshot shows the "Grants List" search interface. It includes input fields for "Grant Number or FAIN" and "Organization". A red box highlights the search icon (a magnifying glass). A blue arrow points to the "Advanced Search" link in the top right corner.

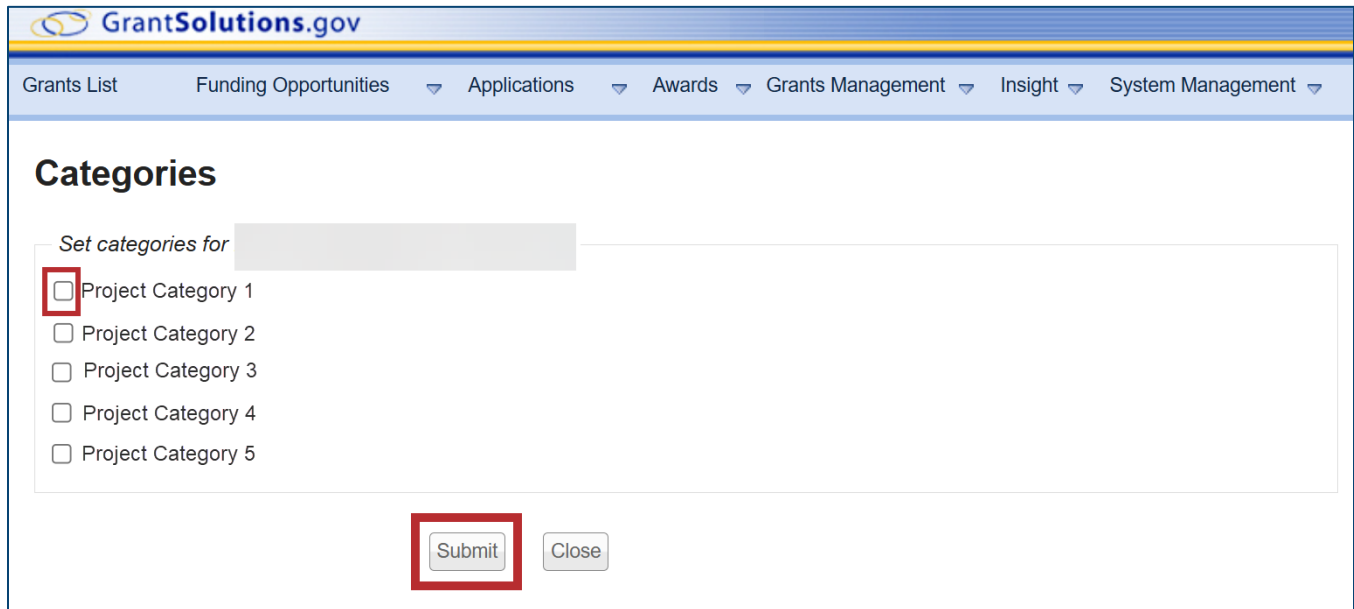
2. The screen refreshes, and grant project(s) that match the search criteria appear in the table below. Click the **View Details** icon.

Search within results		Search	Export Results	Hide Columns ▾
1 - 11 of 11 items				
<input type="checkbox"/>		Submission Date	Application #	Application Type
<input type="checkbox"/>		09/14/2018 12:00:00 AM	1  01	New

3. From the *Actions* column of the view details expanded row, select the **Categories** link.

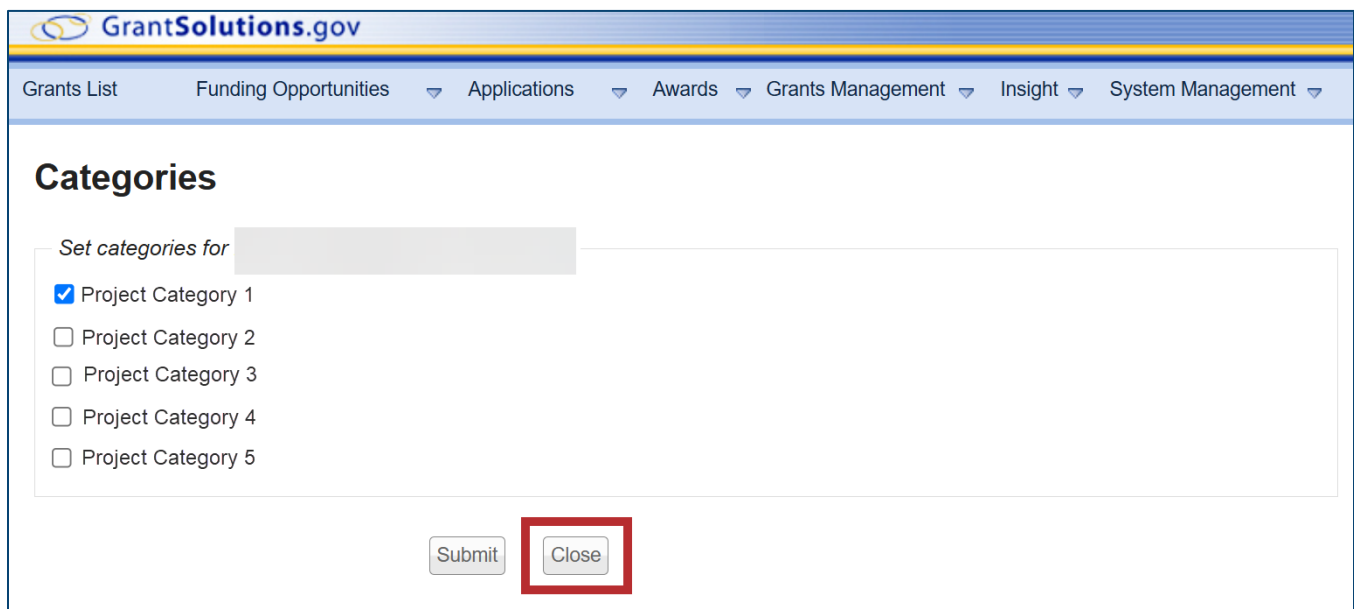
	Program Office	Grant Program	1 ▴	Grant Number	2 ▴	Organization	Project Period3 ▾ Start Date	Project Period End Date	Project Status	Actions
							09/01/2017	08/31/2020	No Amendments In-Progress	     
FAIN: Project Title: Budget Period: 2 Start Date: 09/01/2018 End Date: 08/31/2019 Federal Budget: \$429,999.00 Last Issued Award Grant Number: Issued Date: 11/15/2018 Amendment Number: 1 Terms & Conditions Due Date: 08/31/2019 (2)										Actions Award Summary Contact Management View Report Forms Change Project Locale Manage Commitment Terms and Conditions Funding Restrictions FFR Manage Project Abstract Categories Closeout Checklist Closeout by Budget Period

4. The "Categories" screen appears. Select one or more **categories** checkboxes to assign to a grant project.
5. Click the **Submit** button.








The screenshot shows the GrantSolutions.gov website with the 'Categories' screen. The navigation bar includes 'Grants List', 'Funding Opportunities', 'Applications', 'Awards', 'Grants Management', 'Insight', and 'System Management'. The main heading is 'Categories'. Below it, there is a text input field labeled 'Set categories for'. A list of checkboxes follows: 'Project Category 1', 'Project Category 2', 'Project Category 3', 'Project Category 4', and 'Project Category 5'. The 'Project Category 1' checkbox is highlighted with a red box. At the bottom, there are two buttons: 'Submit' and 'Close'. The 'Submit' button is highlighted with a red box.

6. Click the **Close** button to return to the "Grants List" screen.



The screenshot shows the GrantSolutions.gov website with the 'Categories' screen. The navigation bar is the same as in the previous screenshot. The main heading is 'Categories'. Below it, there is a text input field labeled 'Set categories for'. A list of checkboxes follows: 'Project Category 1', 'Project Category 2', 'Project Category 3', 'Project Category 4', and 'Project Category 5'. The 'Project Category 1' checkbox is checked, indicated by a blue checkmark. At the bottom, there are two buttons: 'Submit' and 'Close'. The 'Close' button is highlighted with a red box.

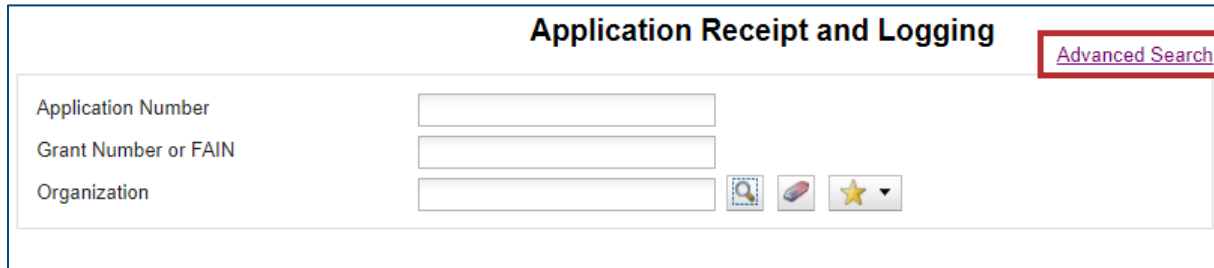
7. The "Grants List" screen appears. The categories are now visible in the *Categories* field of the View Details row.

	Program Office	Grant Program	1 ▲	Grant Number	2 ▲	Organization	Project Period3 ▼ Start Date	Project Period End Date	Project Status	Actions
							09/01/2017	08/31/2020	No Amendments In-Progress	    
<div><div>FAIN: Project Title: Budget Period: 2 Start Date: 09/01/2018 End Date: 08/31/2019 Federal Budget: \$429,999.00 Last Issued Award:</div><div>Project Locale: None Categories: Project Category 1</div><div>Actions Award Summary Contact Management View Report Forms Change Project Locale Manage Commitment Terms and Conditions Funding Restrictions FFR</div></div>										

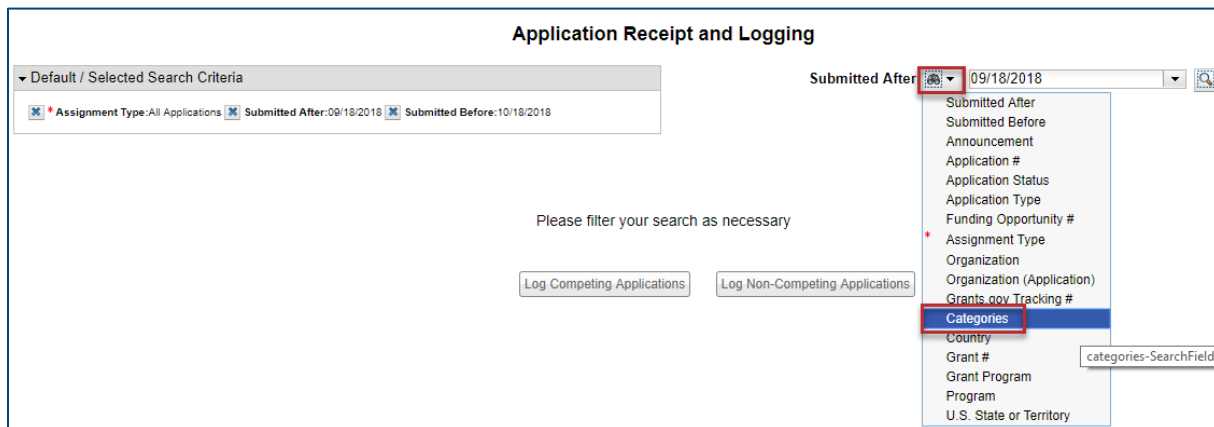
SEARCH FOR APPLICATIONS BY CATEGORY

To search for applications based on the *Categories* filter:


1. From the "Application Receipt and Logging" screen, click the **Advanced Search** link.








2. The "Application Receipt and Logging" *Advanced Search* screen appears. Click the **Search Criteria** icon.
3. Select the **Categories** option.



4. Click the **Filter** drop-down and select a **category** option.



Categories 





   

- Not Categorized
- Agriculture/Forestry/Fish and Game
- Alternate Energy tags
- Applied Research
- Assessment
- Birds
- Civil Defense/Disaster Prevention
- Climate Adaptation (instead of Climate Change)









Please filter your search as necessary

[Simple Search](#)

5. Click the **Search** icon.

Categories 
 


[Simple Search](#)

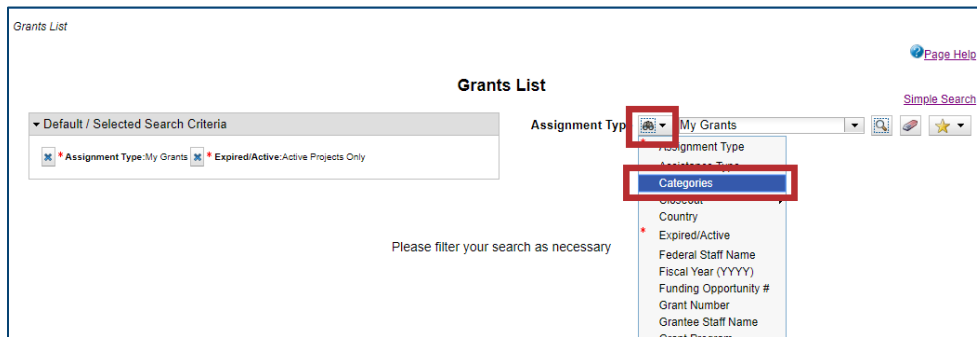
All applications assigned to the selected category appear in the results table.

<input type="text" value="Search within results"/> <input type="button" value="Search"/> <input type="button" value="Export Results"/> <input type="button" value="Hide Columns"/>								
1 - 5 of 5 items 50 100 150 200 1000								
<input type="checkbox"/>	Submission Date	Application #	Application Type	Announcement	Organization	Budget Period End Date	Application Status	Actions
<input type="checkbox"/>	09/25/2017 04:56:43 PM	R  79	New	DC --  -		N/A	Awarded	
<input type="checkbox"/>	09/08/2017 02:51:56 PM	R  73	New	DC --  -		N/A	Awarded	

SEARCH FOR GRANT PROJECTS BY CATEGORY

To search for awarded grant projects based on the *Categories* filter:

1. From the "Grants List" screen, click the **Advanced Search** link.
2. The "Grants List" *Advanced Search* screen appears. Click the **Search Criteria** icon.
3. Select the **Categories** options.



Grants List

Page Help

Simple Search

Grants List

Assignment Type

My Grants

Assignment Type

Categories

Country

Expired/Active

Federal Staff Name

Fiscal Year (YYYY)

Funding Opportunity #

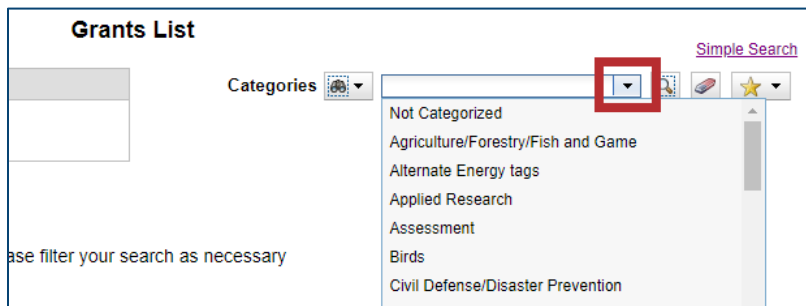
Grant Number

Grantee Staff Name

Grant Review

Please filter your search as necessary

4. Click the **Filter** drop-down and select a category option.



Grants List

Simple Search

Categories

Not Categorized

Agriculture/Forestry/Fish and Game

Alternate Energy tags

Applied Research

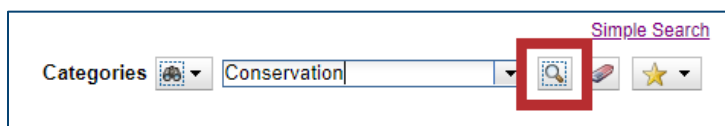
Assessment

Birds

Civil Defense/Disaster Prevention

Please filter your search as necessary

5. Click the **Search** icon.



Simple Search

Categories

Conservation

Search

6. All grant projects assigned to the selected category appear in the results table.

Search within results

Search

Export Results

Hide Columns

1 - 32 of 32 items

50

100

150

200

1000

	Program Office	Grant Number	2 Organization	Project Period Start Date	Project Period End Date	Project Status	Actions
<input type="checkbox"/>				05/01/2017	04/30/2022	Review in Progress (Post Award)	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>
<input type="checkbox"/>				05/01/2017	04/30/2022	No Amendments In-Progress	<div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>