TOPIC GUIDE: GRANT FILES

Audience: Grantors (All Roles)

PURPOSE:

To instruct users on how to navigate Grant Files, which helps with easily accessing, uploading, and downloading grant file data; managing active grants within the system; and organizing grant artifacts.

GRANT FILES KEY POINTS:

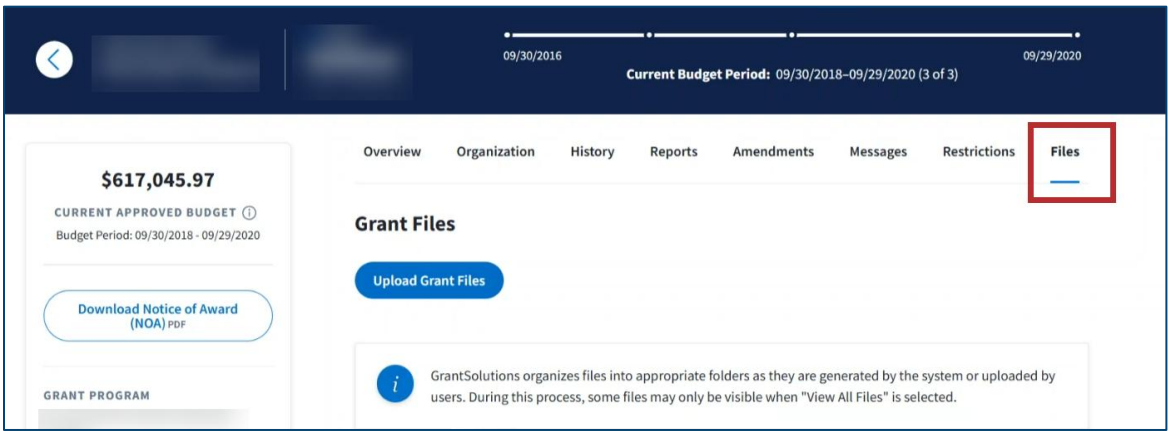
Grant Files has five primary functionalities:

- **Upload Grant Files:** Submit and organize grant file attachments for upload.
- **Download Grant Files:** Download individual grant files, grant files in bulk, or folders in various ways.
- **Search:** Search a file by *File Name*.
- **Filter:** Filter a file by *Budget Period*, *Date Uploaded*, and *Uploaded By*.
- **View All Files:** View all files associated with a grant project.

GRANT FILES:

1. Click the **Files** tab to navigate to the "Grant Files" screen.

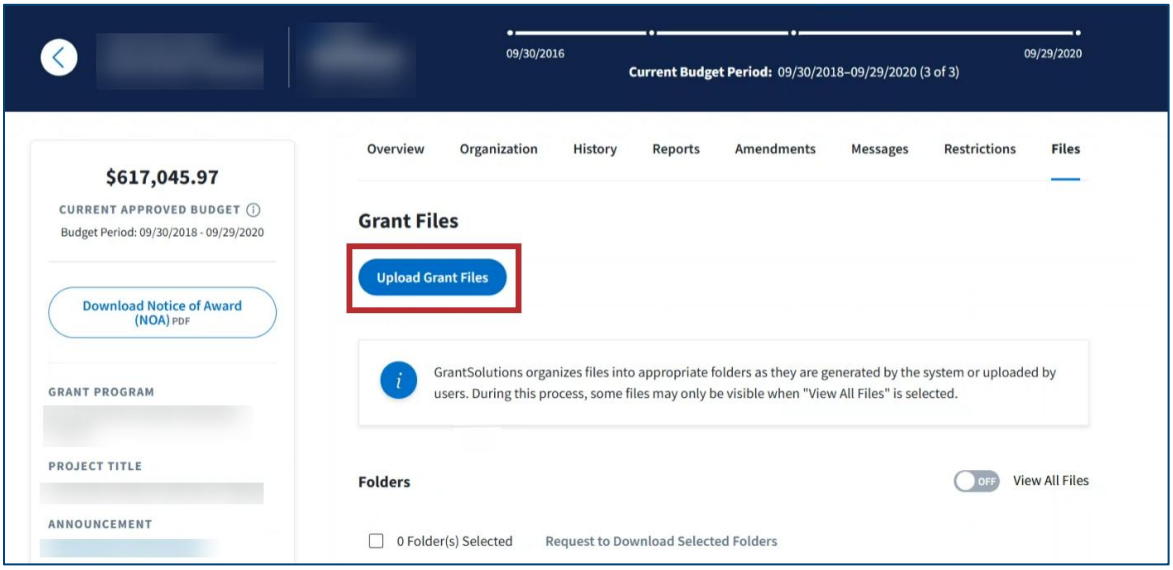
Note: For more information on how to navigate to the "Grant Files" screen, please refer to the "Quick Sheet: Grant Details".



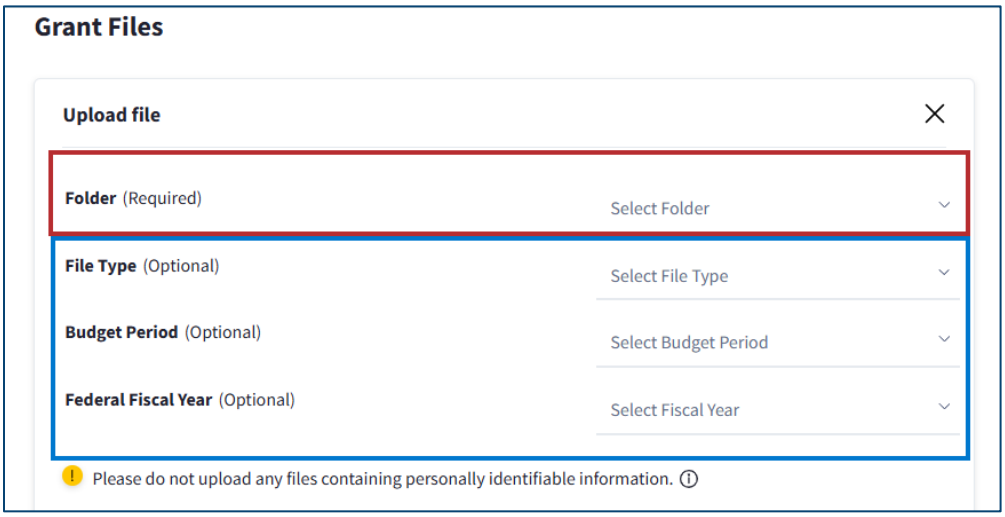
Grant File Uploads

1. From the "Grant Files" screen, click the **Upload Grant Files** button.

Note: Users can upload grant files from the "Grant Files" screen or within a folder.

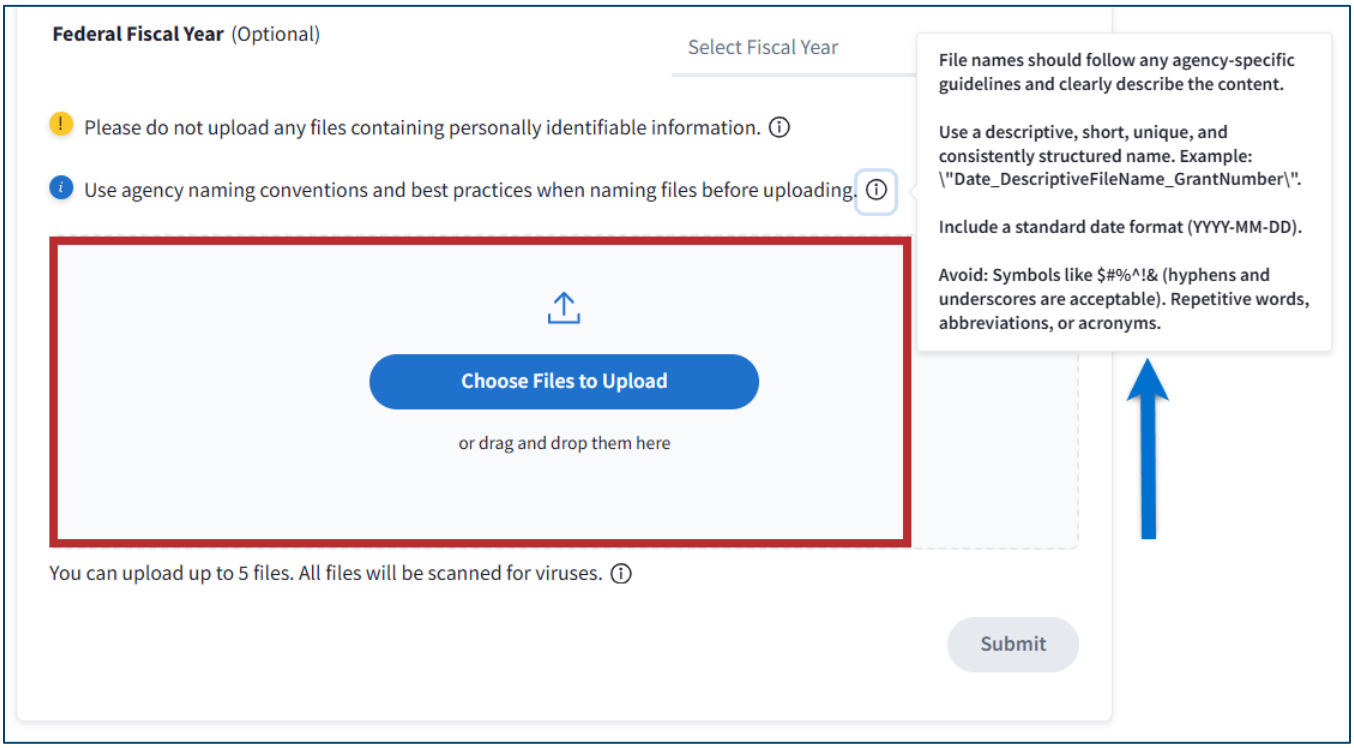


2. Click the **Folder** drop-down and select a **folder** option. If needed, enter optional information about the Grant File upload, which includes *File Type, Budget Period, and Federal Fiscal Year* drop-downs.

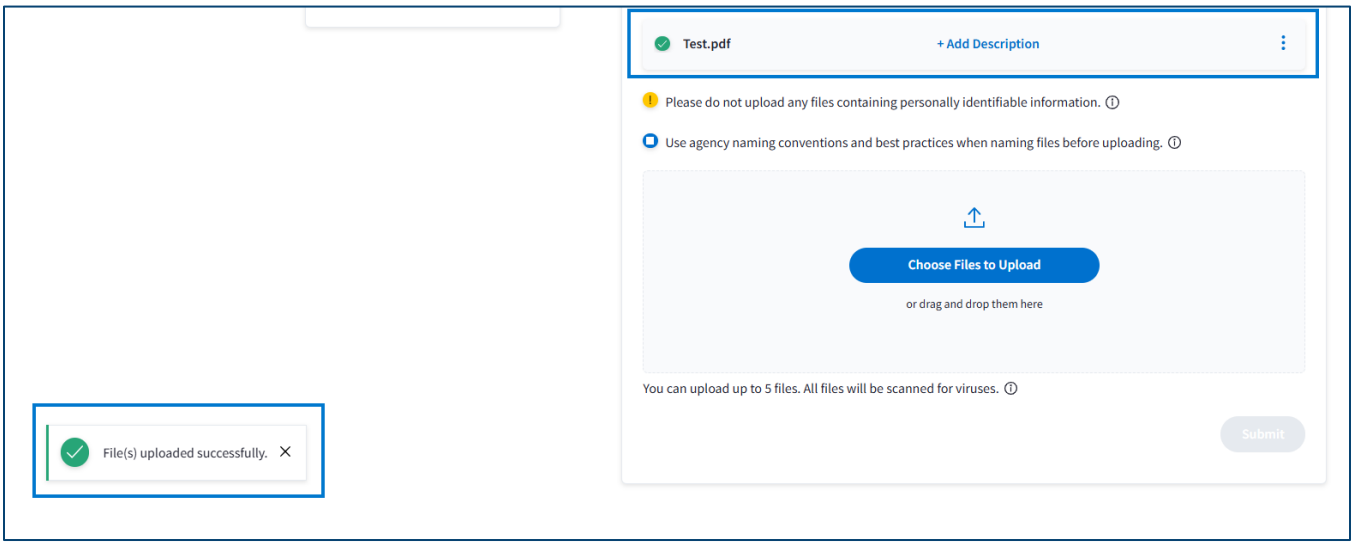


3. Click the **Choose Files to Upload** button or **drag and drop** the file to upload.

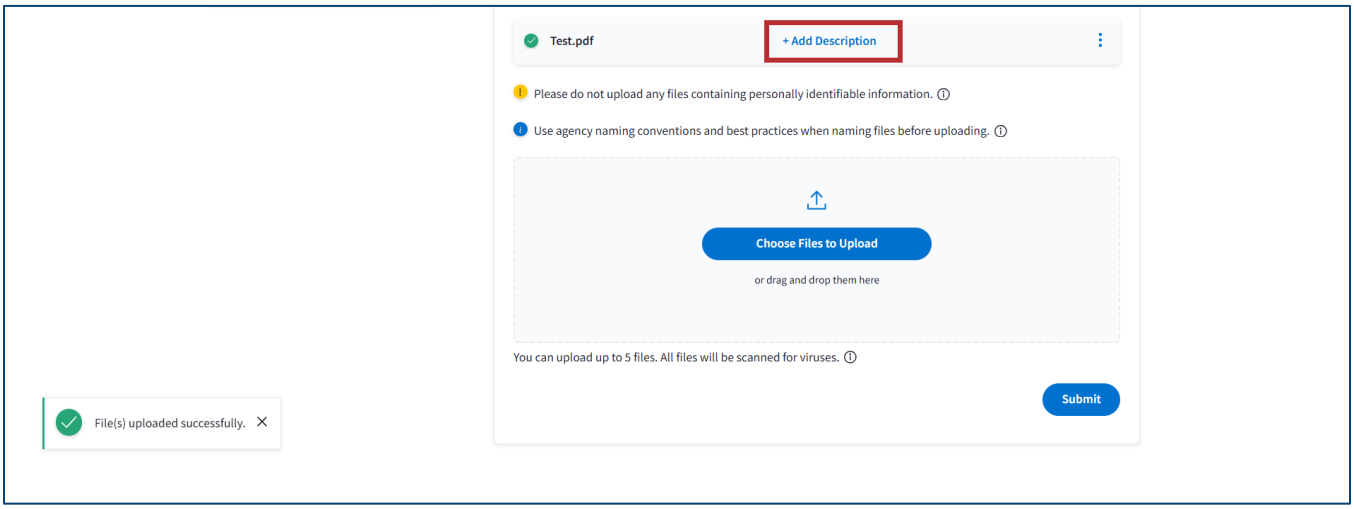
Note: Click the information icon for additional information about file names.



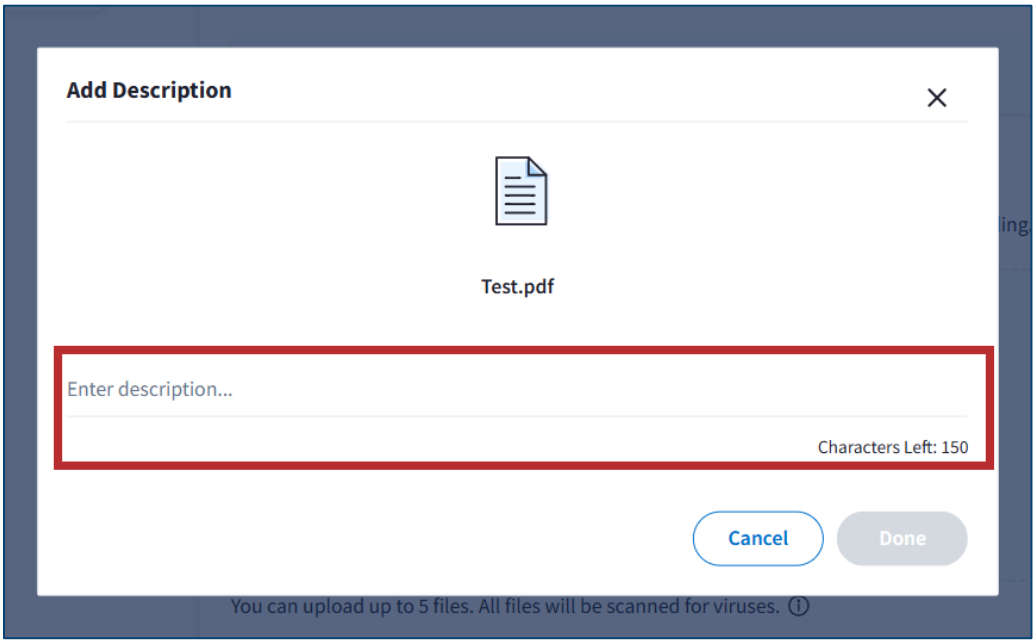
Once a file has been uploaded successfully, the "File(s) uploaded successfully" message appears and the file appears with a green checkmark next to it.



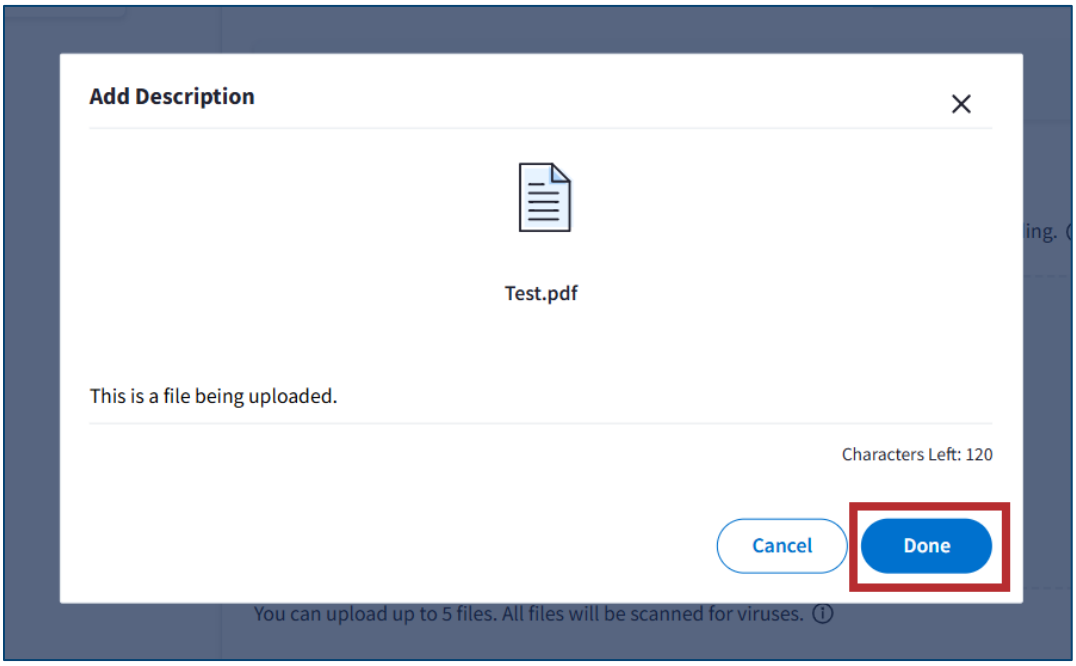
4. After a file has been uploaded, click the **+ Add Description** hyperlink.



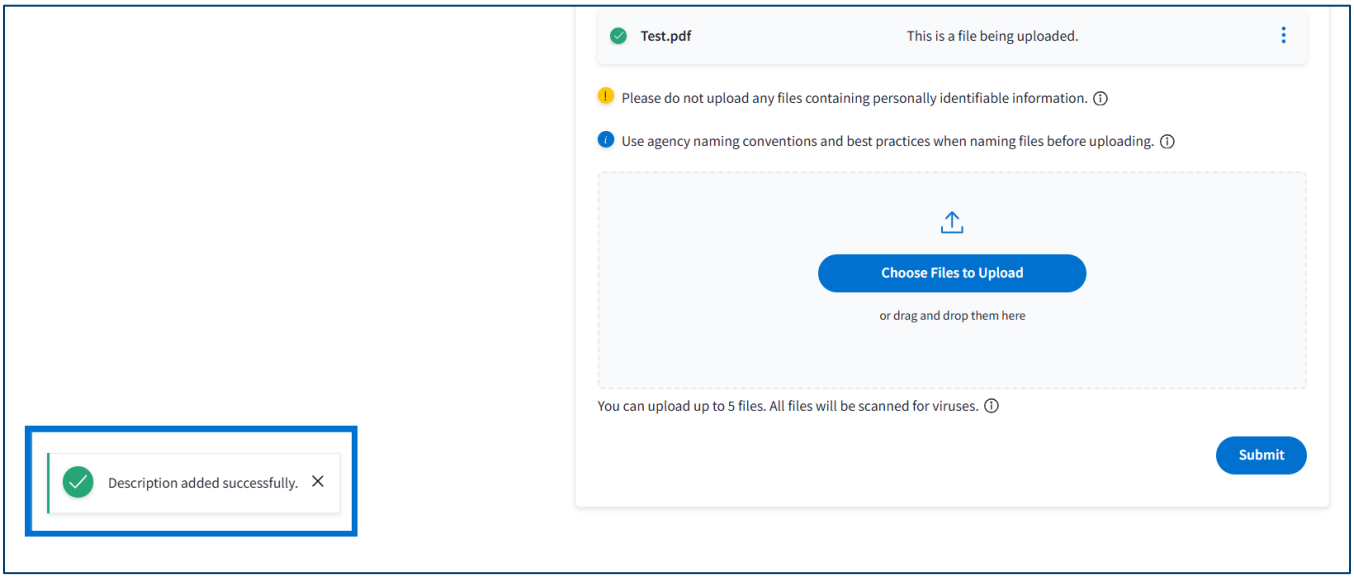
5. Enter a description, up to 150 characters.



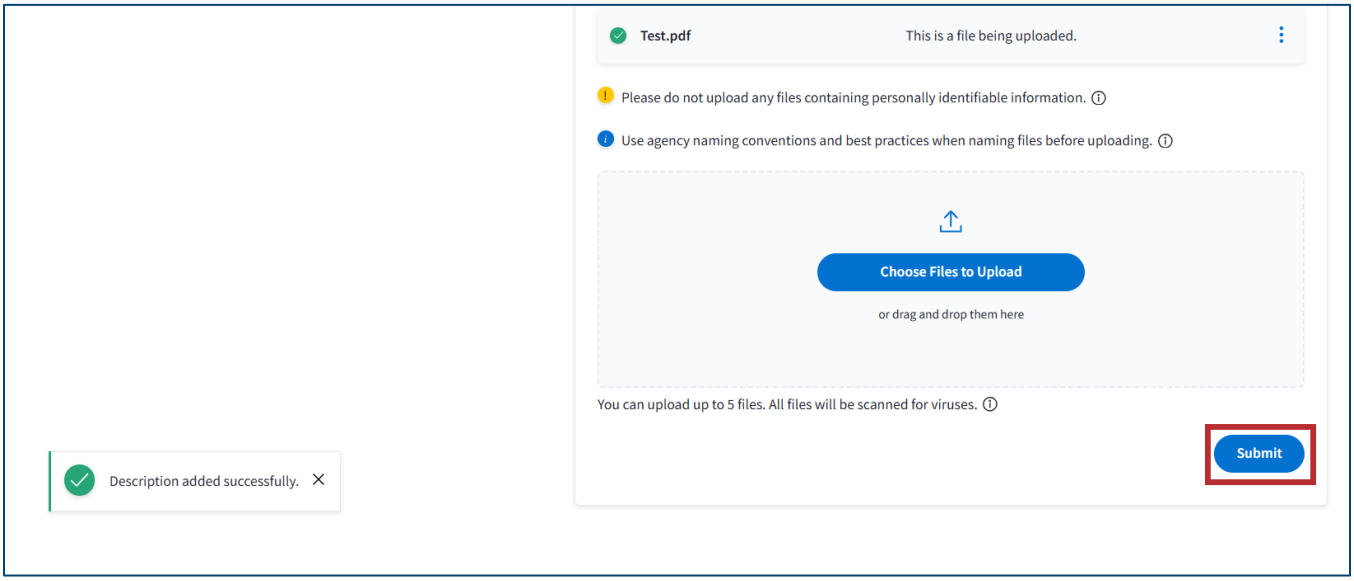
6. After entering the file description, click the **Done** button.



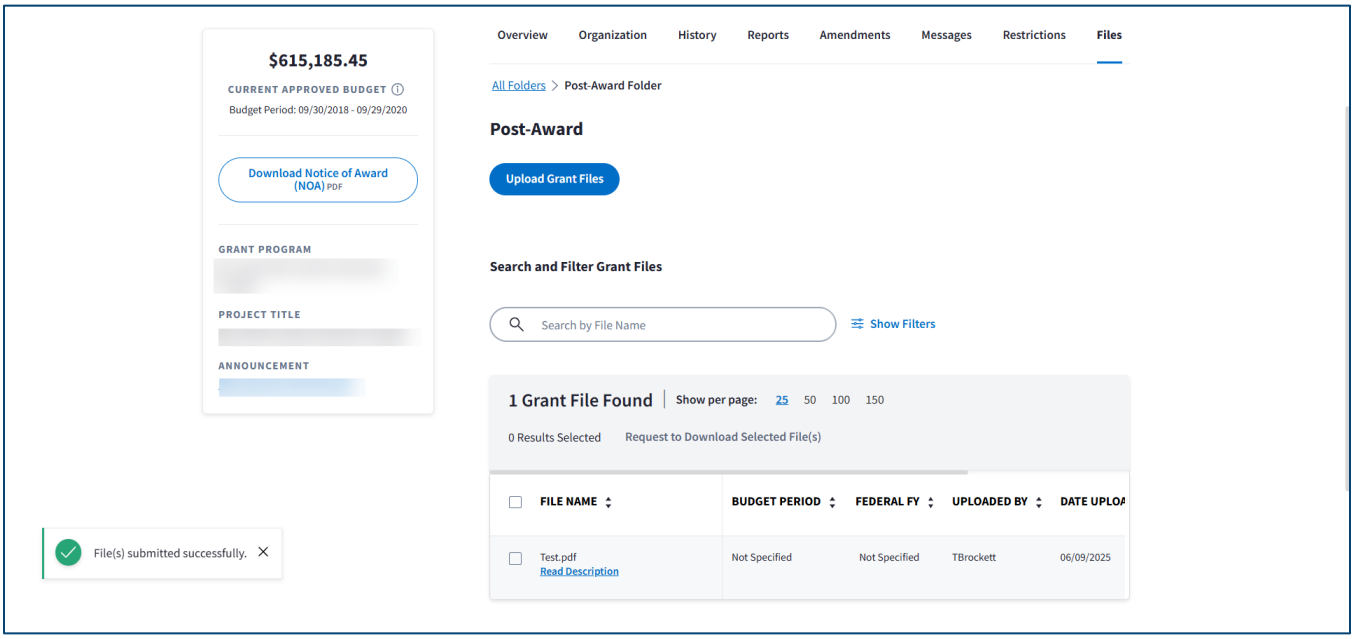
The “Description added successfully” message appears.



7. Once all required information has been entered and the document has been uploaded, click the **Submit** button.

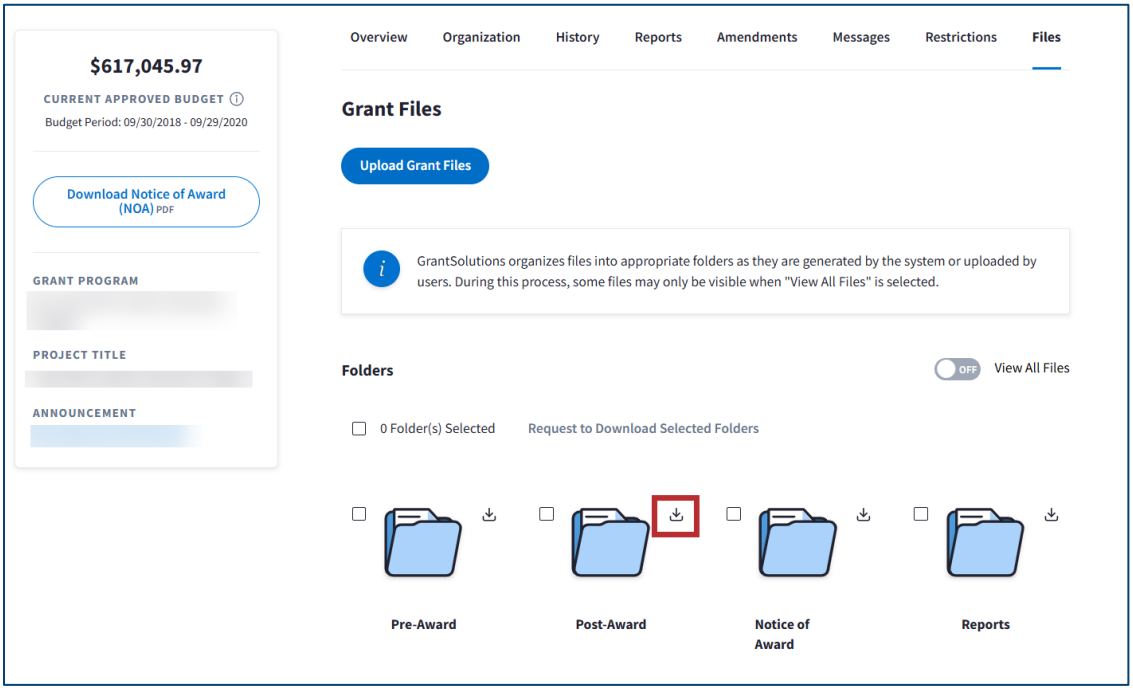


The grant file appears in the associated file folder.

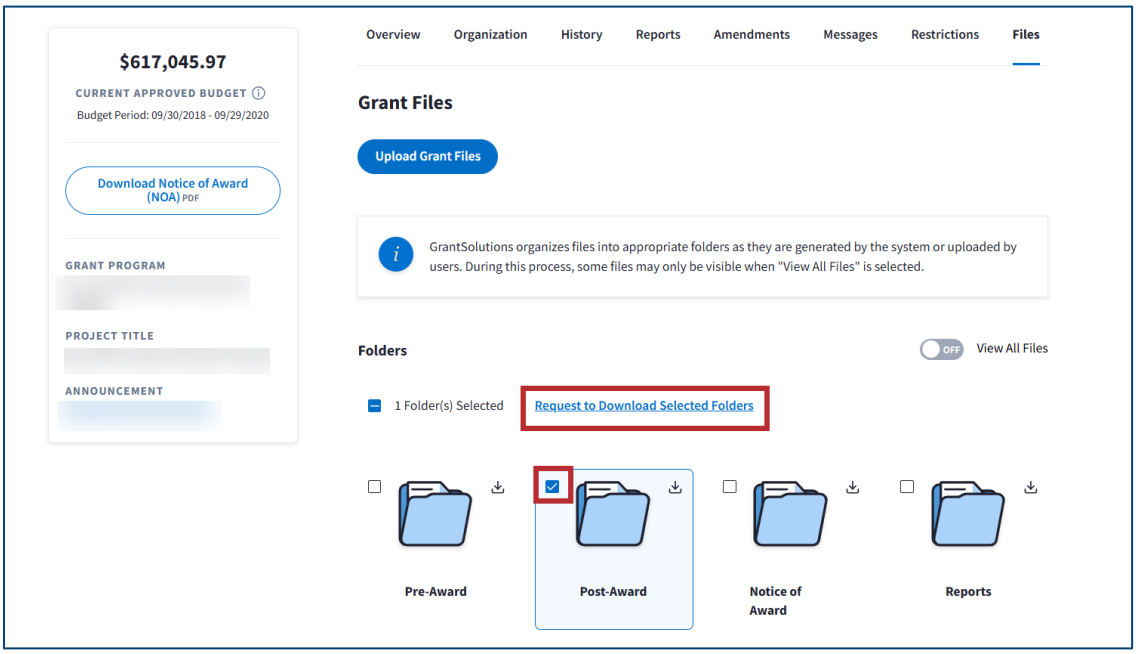


Grant File Downloads

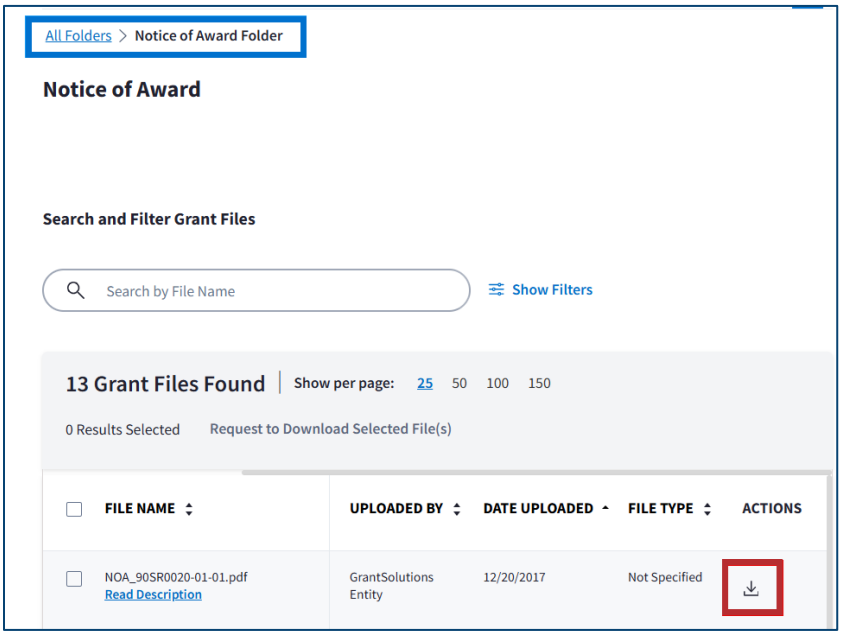
1. To download grant files, either:
    a. Click the **download** icon.



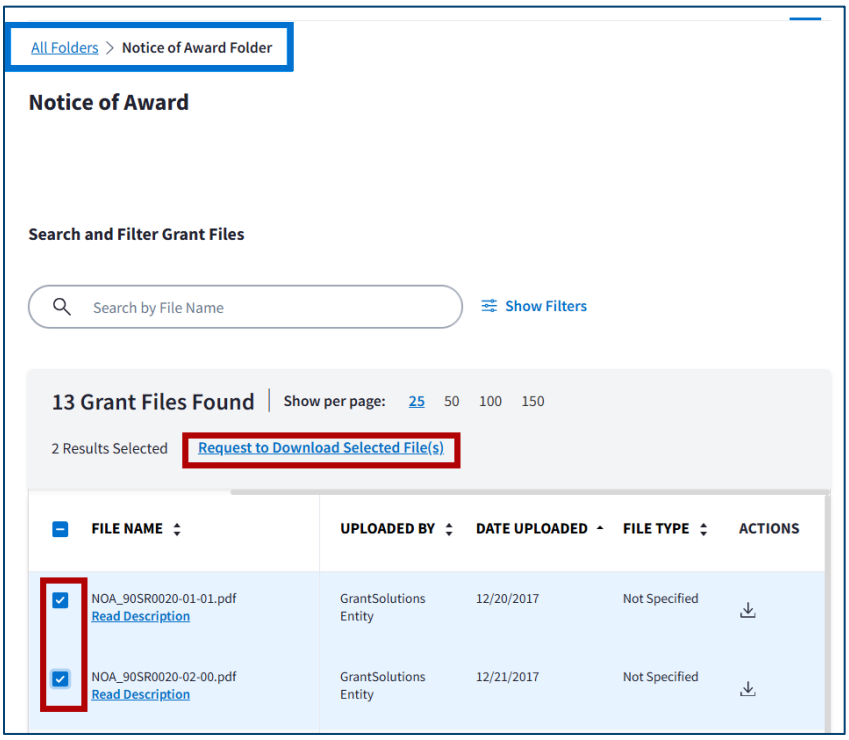
    b. Click the **checkmark**. Then, click the **Request to Download Selected Folders** link.



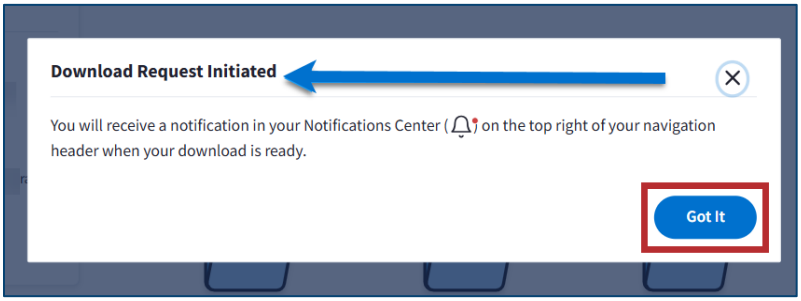
c. Click within a folder. Then, click the **download** icon next to an individual file.



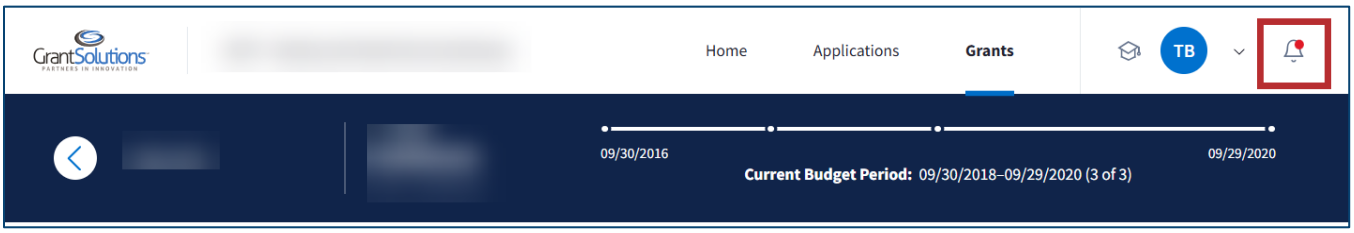
d. Click within a folder. Then, click the **checkbox** next to multiple files and click the **Request to Download Selected Files** link.



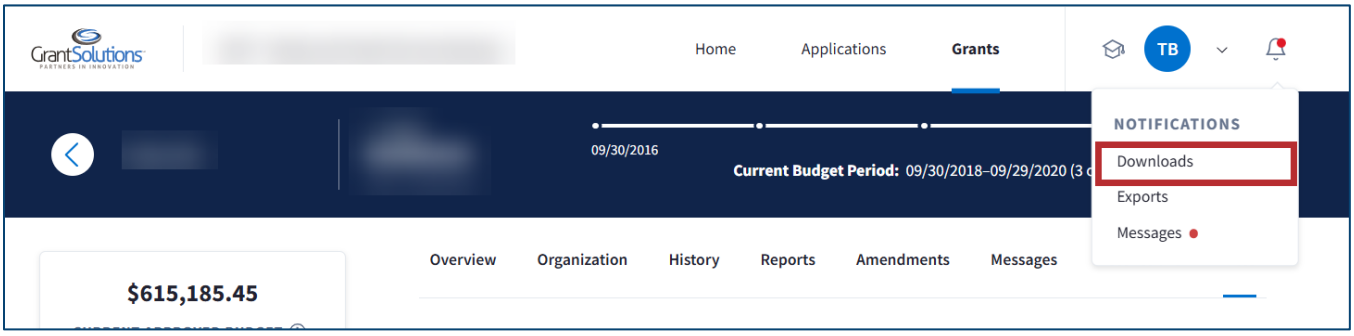
2. Once file(s) are downloaded, a message will appear stating that a notification will be available in the Notification Center when the download is ready. Click the **Got It** button.



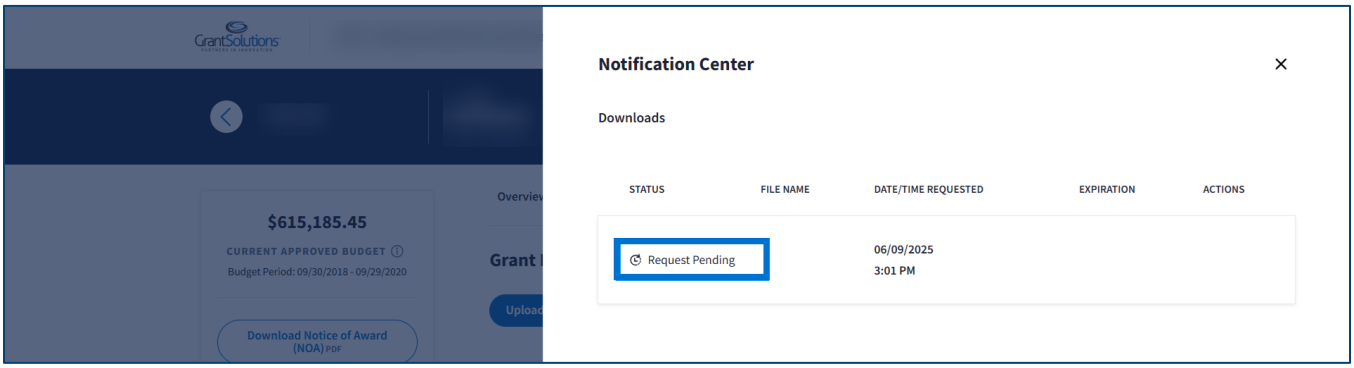
3. Click the **Notification Center** icon.



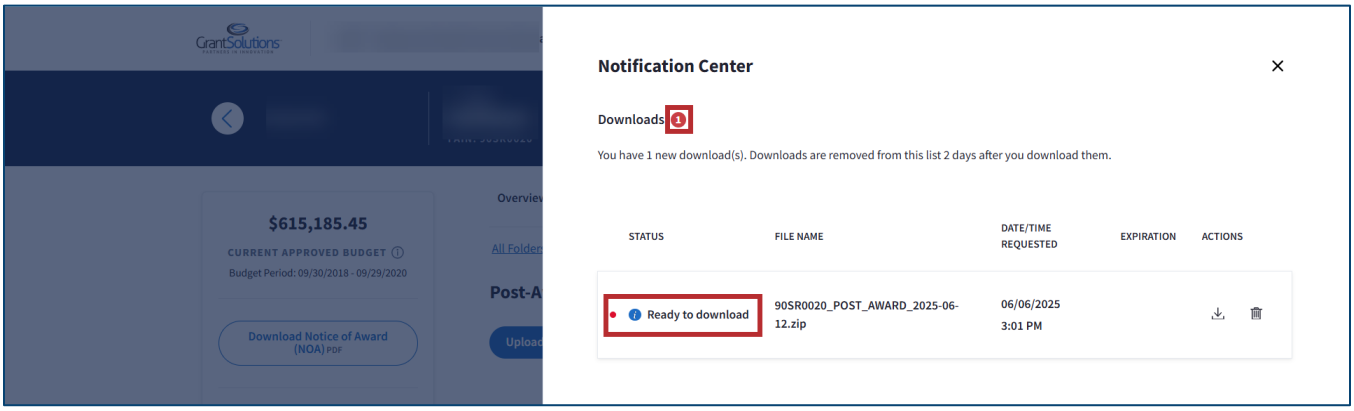
4. The Notifications drop-down appears. Click **Downloads** option.



Initially, the download request status will say “Request Pending”.



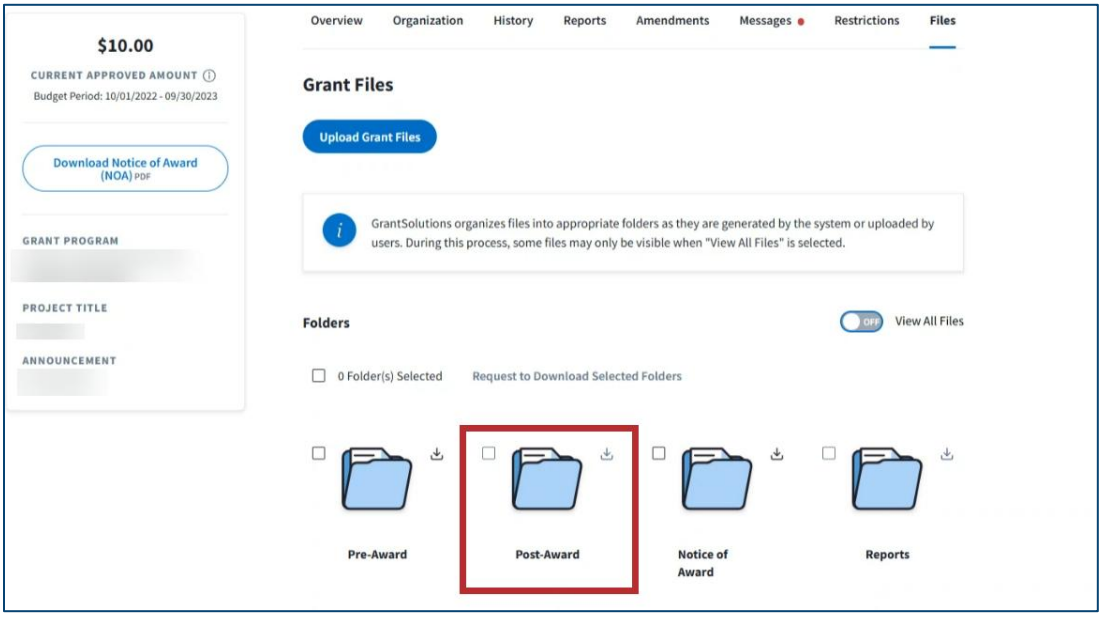
5. Following a system scan, the download status will change to *Ready to Download*, and the file(s) can be downloaded by clicking the **download** icon in the *Actions* column.



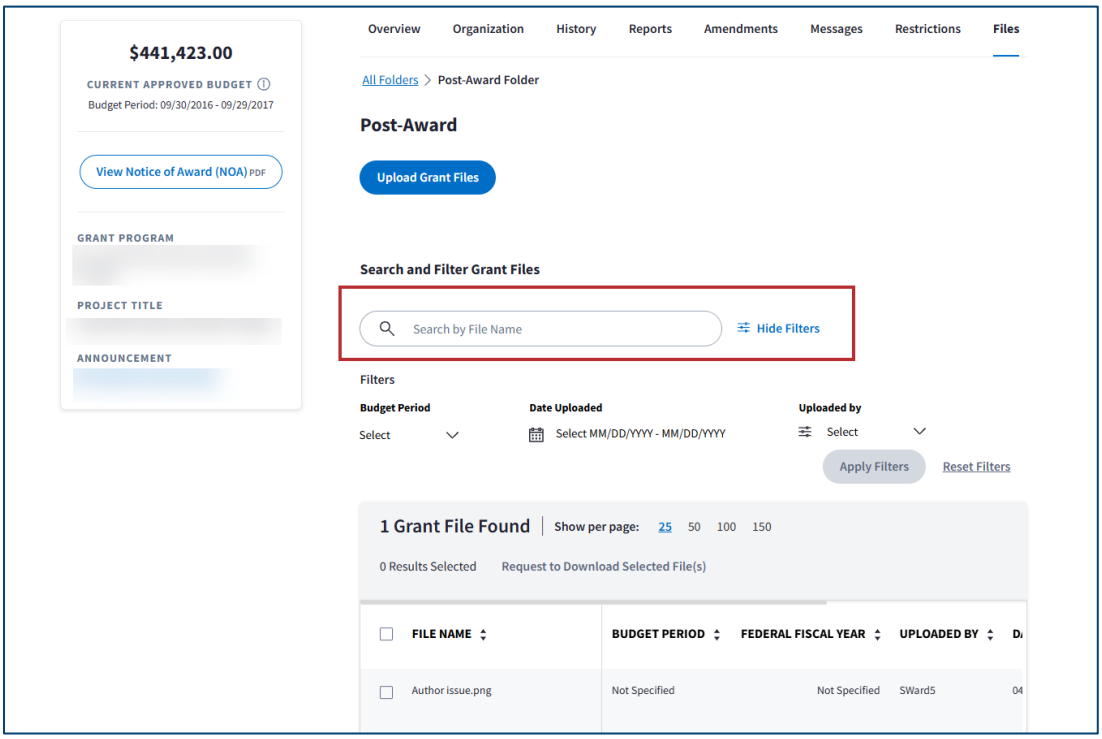
Search & Filter

1. To search and filter your grant files, click on a **grant file folder**.

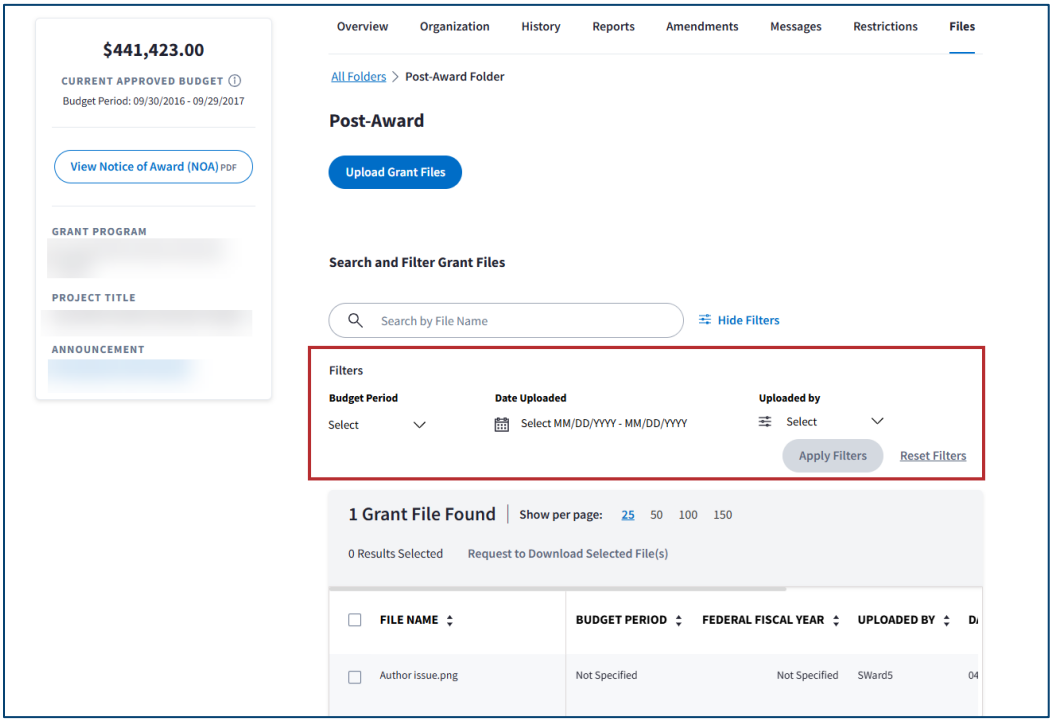
Note: You can search with the *View All Files* button toggled on or off.



2. Search existing grant files by **file name**.

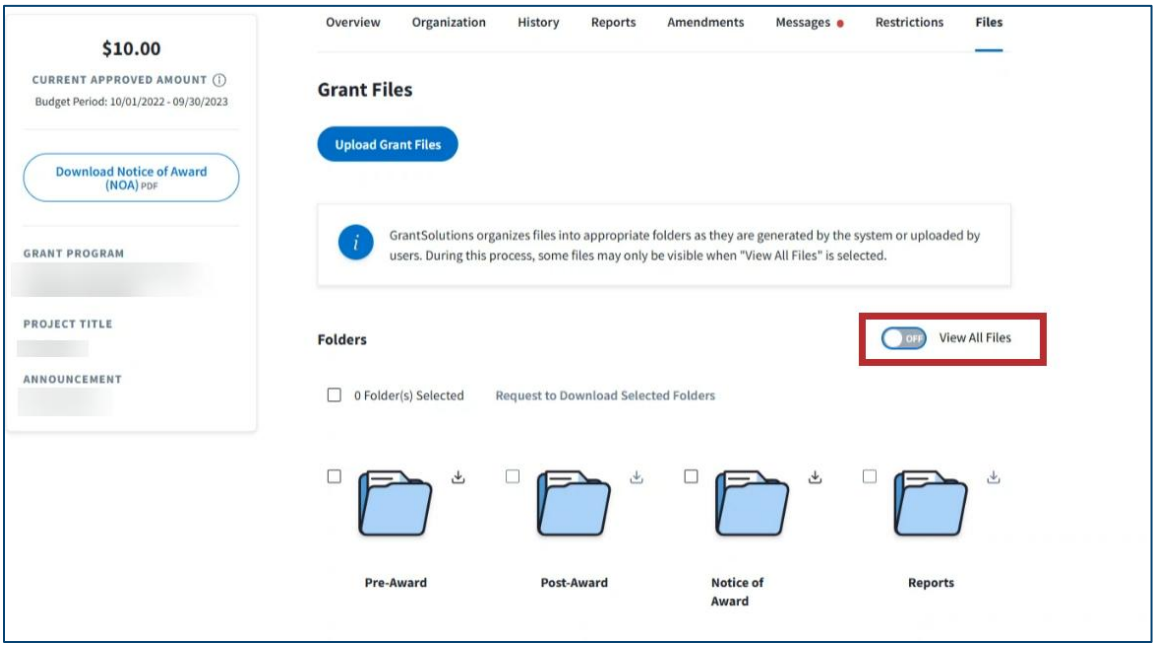


3. Filter existing grant files by **Budget Period, Date Uploaded, or Uploaded by** *(author)* and click the **Apply Filters** button.

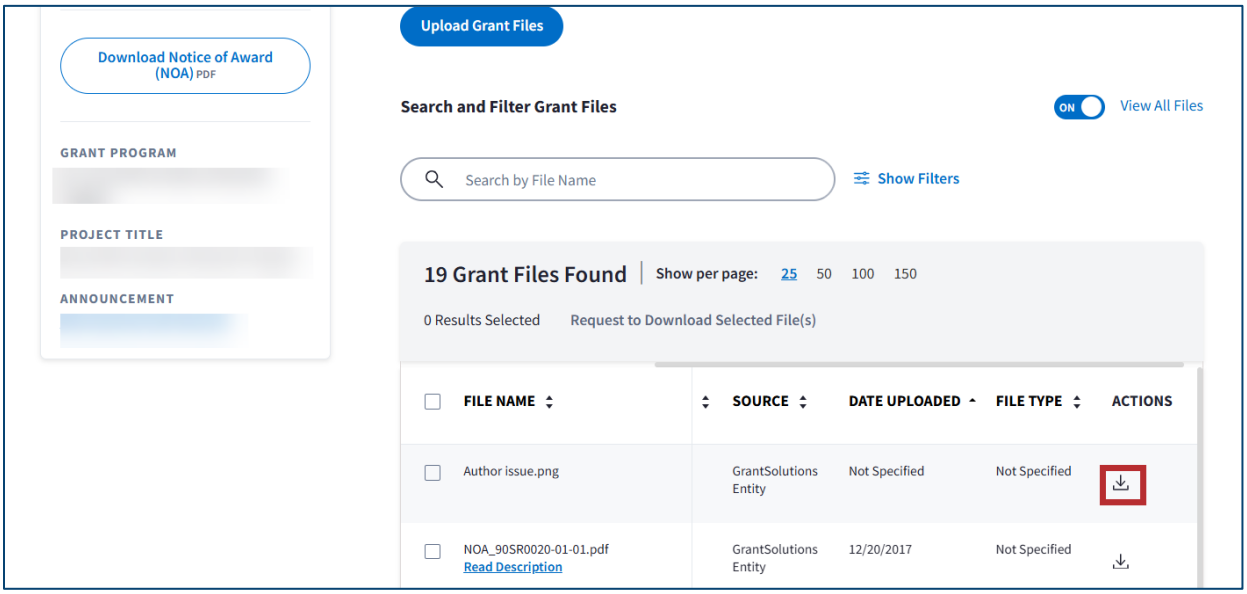


View All Files

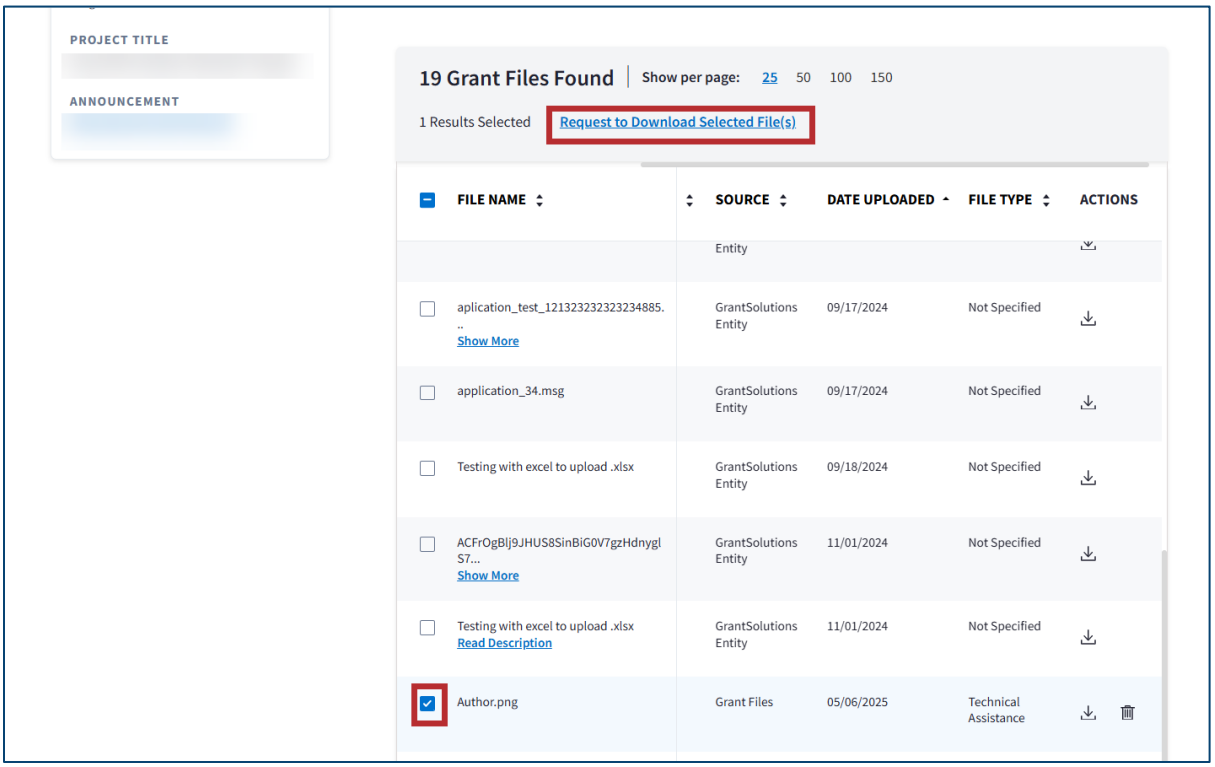
1. To view all files associated with a grant project, click the **View All Files** toggle.



2. This will populate a table with all the Grant Files. From here, users can download files by either:
    a. Clicking the **download icon** for the file.



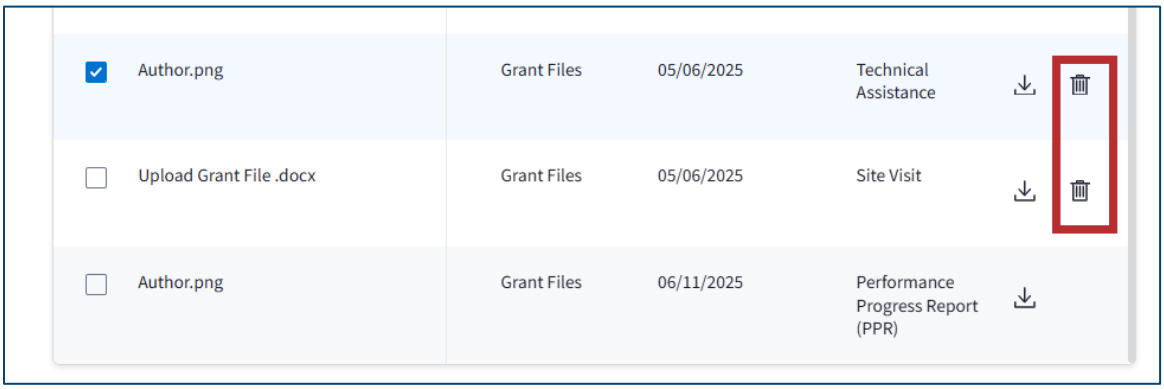
    b. Clicking the **checkbox** next to a file, then clicking the **"Request to Download Selected File(s)"** hyperlink.



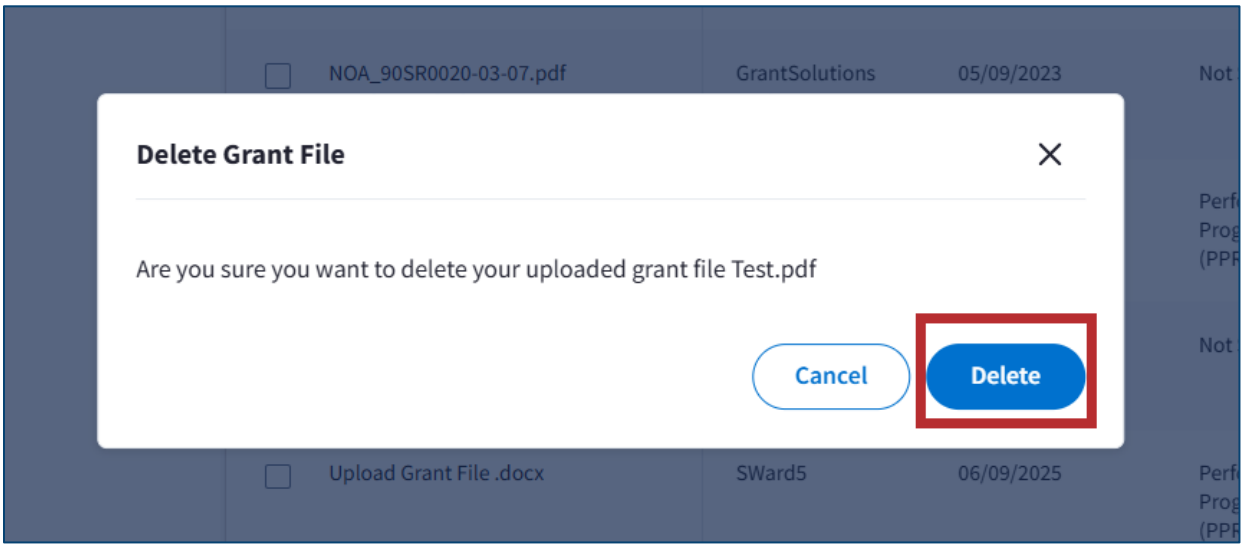
This will send a request to the Notification Center where the files will be available for download, pending a system scan.

3. Files can be deleted by clicking the **Delete** icon.

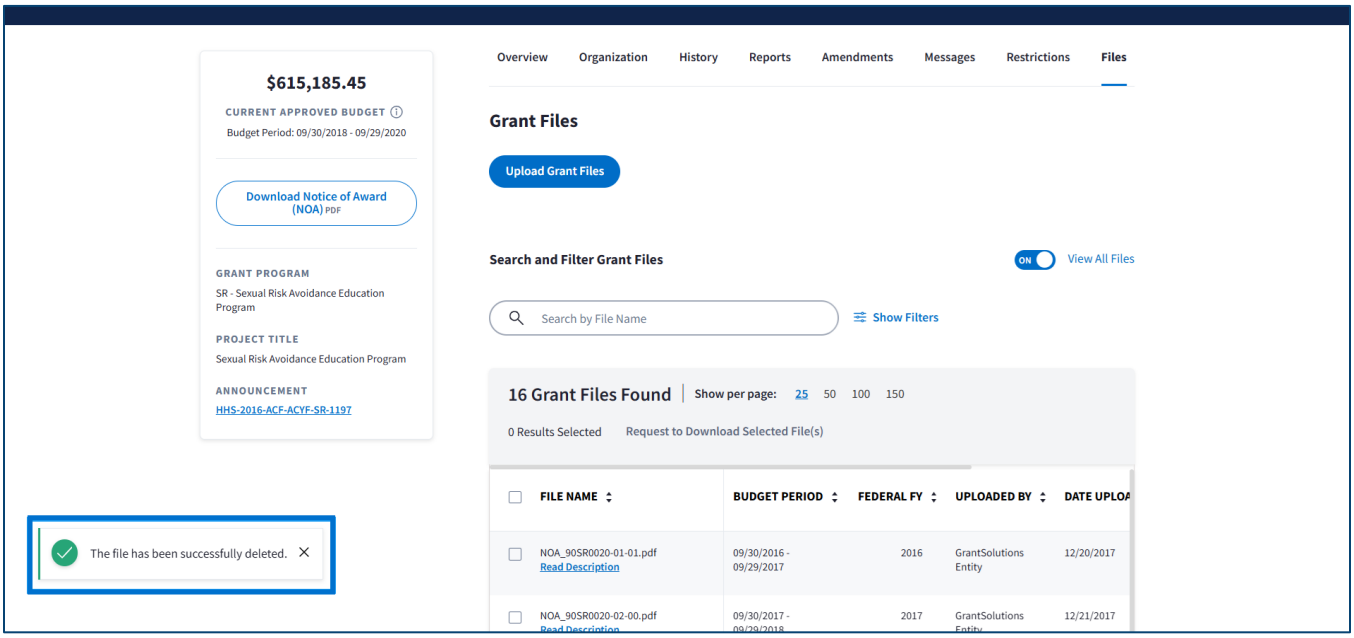
Note: Users can only delete files which they uploaded. If they did not upload the file, the *Delete* icon will not appear.



4. Upon clicking the *Delete* button, the *Delete Grant File* window appears asking for confirmation to delete the file. To continue, click the **Delete** button.



"The file has been successfully deleted message" appears.



FILE LOCATION:

The table below depicts a breakdown of where files are located within Grant Files.

Note: New files may get created and incorporated within a given folder.

File Location	Notes
Notice of Award Folder	
All Notice of Award Actions	The user does not have the ability to upload files to this folder.
Computation Sheets	
Report Folder	
Federal Financial Reports (FFR) & Performance Progress Reports (Post-Award Reports)	
Pre-Award Folder	
Application Attachments	For new applications, these will display in the Pre-Award folder.
Post Submission Attachments	
Funding Memo Attachments	
Post-Award Folder	
Application Attachments	For Non-Competing Continuations (NCCs), Closing Cost Assistance Grants (CCAs), Data Sharing Agreement Grants (DSAs), and Post-
Post-Submission Attachments	
Funding Memo Attachments	

File Location	Notes
	Award Amendments (PAAs), they will display in the Post-Award folder.
Closeout	
Final FFR & Final PPR	
Grant Messages Attachment	
All Grant Message Attachments	The user does not have ability to upload files to this folder.
Risk Management	
User Uploaded Files	