

## How to Use the Grid System

The Award Management system (FS4U) uses system grids to organize information, create exports, and perform bulk actions (i.e., email users or categorize applications).

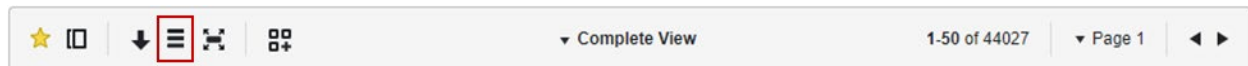
### Available System Grids

- **Auto-Match** – Opportunities that automatically submit applications for awards in which an applicant meets the opportunity’s qualifications  
**Note:** Drafted and Submitted applications won’t appear in the bulk auto-match grid.
- **Apply-To** – Opportunities that require applicants to submit an application before they can be considered for an award
- **Post-Acceptance** – Questionnaires accompanying most scholarship awards that serve to collect information from recipients that can be shared with donors (i.e., thank-you letters)

### Customizing Views

To customize a grid, you can adjust the following options:

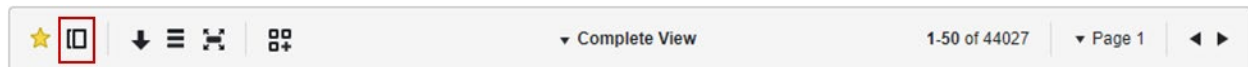
- Using the “hamburger” icon (as shown below), you can select columns to show or remove



- From a column heading, you can reorder columns by dragging and dropping them
- Using column filters, you can add specific values to filter applications or select a column heading to sort by that column

### Creating Saved Views

To save your current view for yourself and other users, select the overlapping boxes icon (as shown below). You will then be prompted to enter a name and select **Create**.



To access your saved views, use the drop-down menu at the top of the grid where the default value reads **Complete View**. Once in a saved view, you can save changes using the checkmark icon or delete a view by selecting the X icon.

### Downloading Saved Views

From any saved view, you can download a .CSV file by using the downward facing arrow icon. If requesting a larger report (and especially one that includes documents), this can take some time to generate but you will receive an email from FS4U once the report is ready for download.

## Advanced Filtering

You can search for specific information within FS4U by using the search boxes below any column heading. Be sure not to include any spaces at the end of your string of text.

For help creating detailed filters, scrolling over the **(i)** button in the right of the search fields will show a list of operands that can be used to create more advanced filters.

|| - Logical OR, e.g., 'Freshman || Sophomore'  
 <> - Does not include  
 = - Includes  
 < - Less than  
 <= - Less than or equal to  
 > - Greater than  
 >= - Greater than or equal to  
 BLANK - A blank or NULL value  
 TODAY - A shortcut for the current date, e.g., 5/7/2024  
 "search text" - Return exact matches; valid on text only fields

**Note:** the logical **OR** operand uses the following syntax without any parentheses ( || )  
 i.e., (Freshman || Sophomore)

**Pro Tip:** if needing to search for a list of IDs from an Excel document, you can utilize the TEXTJOIN formula.  
 Syntax: =textjoin(delimiter, ignore\_empty, text1, ...)

In this scenario, we have a list of EMPLIDs that we want to search in the Applicants grid using the Emplid search box.

	A
1	EMPLID
2	200100100
3	200200200
4	200300300
5	200400400
6	200500500

The proper syntax for this formula would be =textjoin(" || ",true,a2:a6)  
 This will output each of the EMPLIDs in the list separated by a space, two vertical bars, and another space.

200100100 || 200200200 || 200300300 || 200400400 || 200500500

This string of text can be copied/pasted into the proper search field within FS4U.

Emplid

200100100 || 200200200 || 200300300 || 200400400 || 200500500

## Icon Legend



Download report



Change visible columns



Create a new dashboard card from the current grid state



Create new view from the current grid state



Save current view



Delete saved view



Make current view the default