

Award Import/Export Overview

The Award Export & Import feature allows users to export award data from Euna Grants, make updates offline in a spreadsheet, and re-import the data to update existing awards or insert new ones. This workflow is designed to support bulk award maintenance while ensuring consistency with the system's import templates and validation rules.

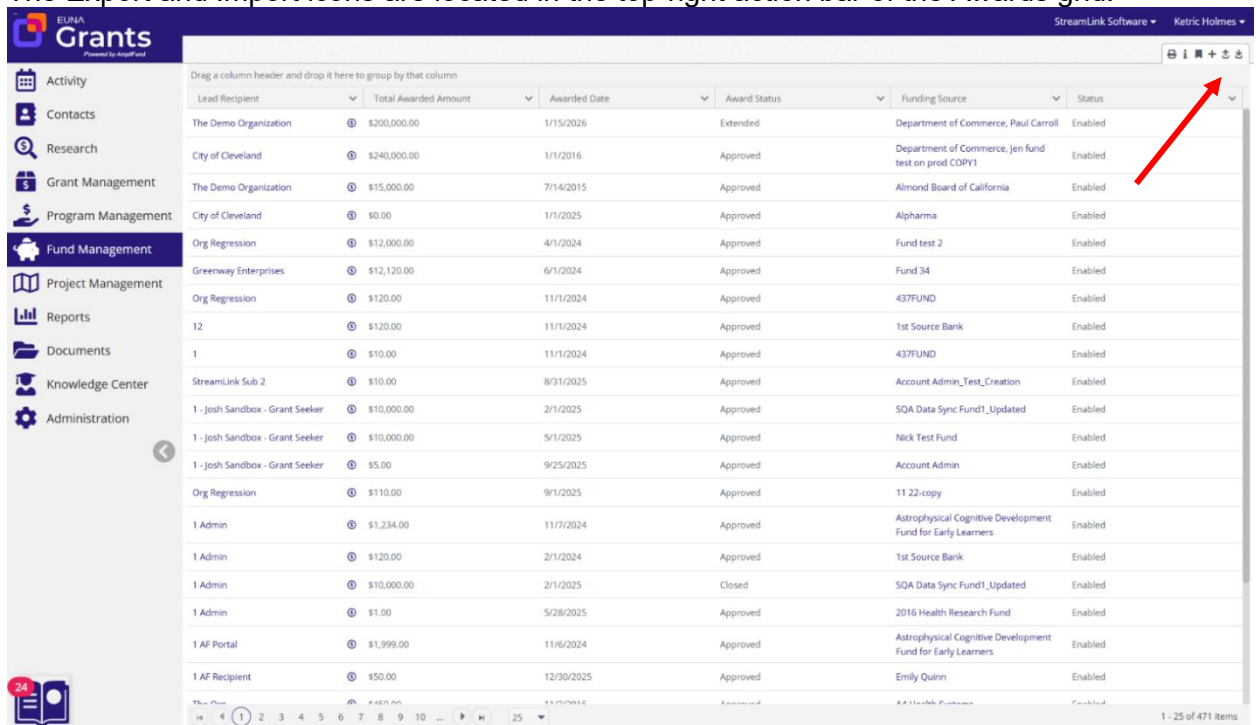
The feature supports:

- Exporting awards from the Awards grid
- Exporting awards in a format optimized for re-import
- Updating awards using configurable match keys
- Automatic recalculation of Grant-Funded Amount when funding sources change

This feature is available from the Awards grid under Fund Management.

How to Access Award Export/Import

1. Navigate to Fund Management > Awards.
2. The Export and Import icons are located in the top-right action bar of the Awards grid.

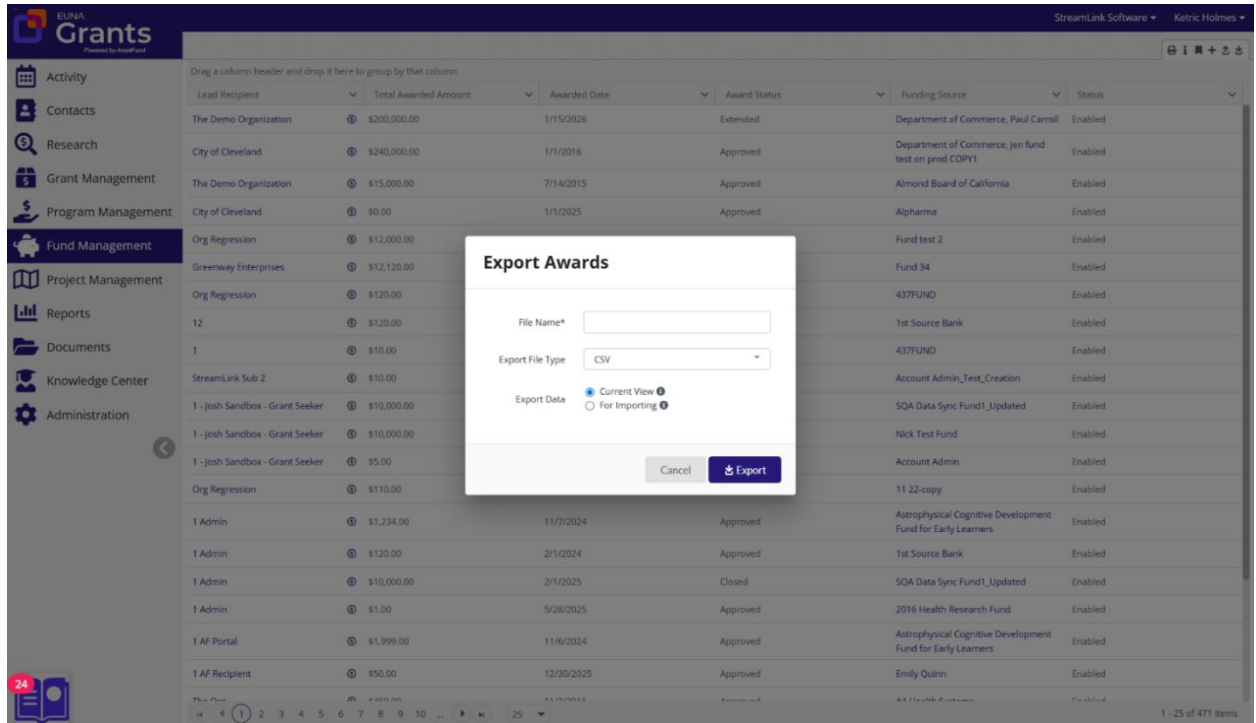


| Lead Recipient | Total Awarded Amount | Awarded Date | Award Status | Funding Source | Status |
|---------------------------------|----------------------|--------------|--------------|---|---------|
| The Demo Organization | \$200,000.00 | 1/15/2026 | Extended | Department of Commerce, Paul Carroll | Enabled |
| City of Cleveland | \$240,000.00 | 1/1/2016 | Approved | Department of Commerce, Jen fund test on prod CDPY1 | Enabled |
| The Demo Organization | \$15,000.00 | 7/14/2015 | Approved | Almond Board of California | Enabled |
| City of Cleveland | \$0.00 | 1/1/2025 | Approved | Alpharma | Enabled |
| Org Regression | \$12,000.00 | 4/1/2024 | Approved | Fund test 2 | Enabled |
| Greenway Enterprises | \$12,120.00 | 6/1/2024 | Approved | Fund 34 | Enabled |
| Org Regression | \$120.00 | 11/1/2024 | Approved | 437FUND | Enabled |
| 12 | \$120.00 | 11/1/2024 | Approved | 1st Source Bank | Enabled |
| 1 | \$10.00 | 11/1/2024 | Approved | 437FUND | Enabled |
| StreamLink Sub 2 | \$10.00 | 8/31/2025 | Approved | Account Admin_Test_Creation | Enabled |
| 1 - Josh Sandbox - Grant Seeker | \$10,000.00 | 2/1/2025 | Approved | SQA Data Sync Fund1_Updated | Enabled |
| 1 - Josh Sandbox - Grant Seeker | \$10,000.00 | 5/1/2025 | Approved | Nick Test Fund | Enabled |
| 1 - Josh Sandbox - Grant Seeker | \$5.00 | 9/25/2025 | Approved | Account Admin | Enabled |
| Org Regression | \$110.00 | 9/1/2025 | Approved | 11 22-copy | Enabled |
| 1 Admin | \$1,234.00 | 11/7/2024 | Approved | Astrophysical Cognitive Development Fund for Early Learners | Enabled |
| 1 Admin | \$120.00 | 2/1/2024 | Approved | 1st Source Bank | Enabled |
| 1 Admin | \$10,000.00 | 2/1/2025 | Closed | SQA Data Sync Fund1_Updated | Enabled |
| 1 Admin | \$1.00 | 5/28/2025 | Approved | 2016 Health Research Fund | Enabled |
| 1 AF Portal | \$1,999.00 | 11/6/2024 | Approved | Astrophysical Cognitive Development Fund for Early Learners | Enabled |
| 1 AF Recipient | \$50.00 | 12/30/2025 | Approved | Emily Quinn | Enabled |

How to Export Awards

To export awards from the Awards grid:

1. Navigate to Fund Management > Awards.
2. Click the Export icon in the top-right action bar.
3. The Export Awards modal will appear with the following options:
 - File Name (required): Enter a name for the export file.

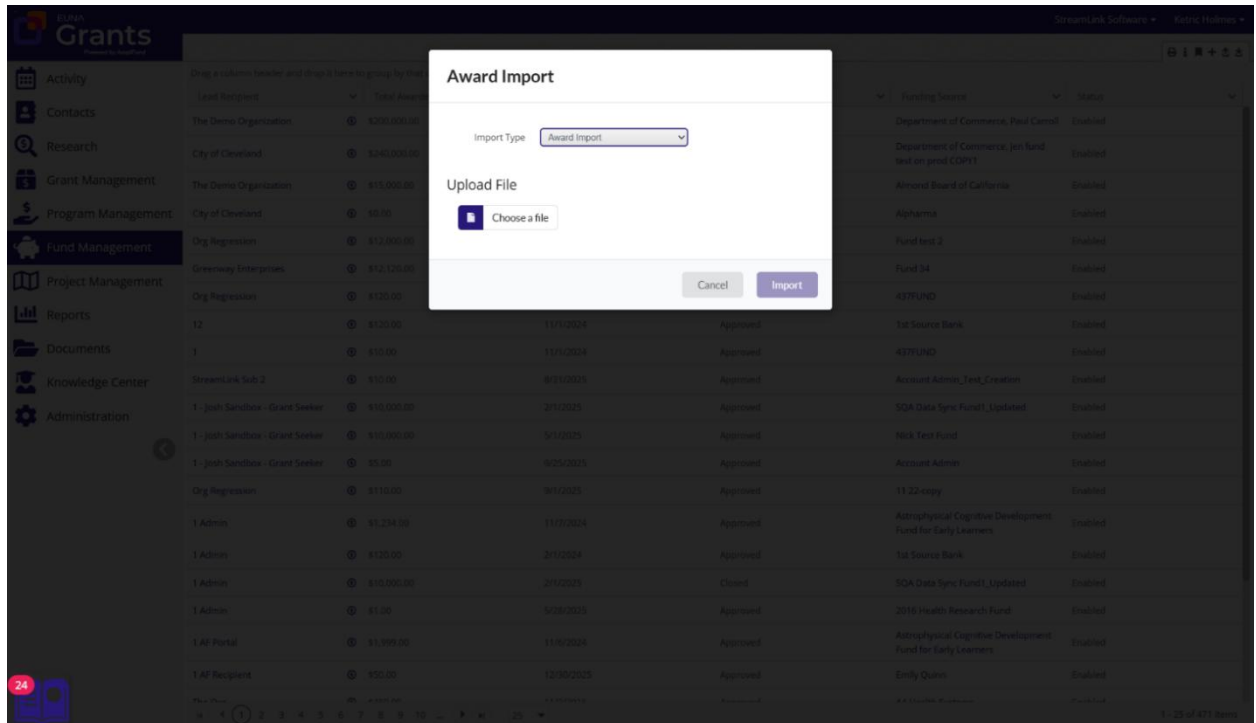


- **Export File Type:** Choose between CSV or Excel.
 - **Export Data:** Select one of the following:
 - **Current View:** Exports visible data only. Downloads data matching the current grid layout, honoring active filters, column sorting, and visible columns.
 - **For Importing:** Exports data to be updated and reimported using the Euna Grants import template. Designed for direct modification and re-import. Filters and sorting from the grid are applied.
 - Note the Award export from Euna includes the Grant Id in column A for easy re-import.
4. Click Export to download the file.

Note: The following settings columns are not included in the “For Importing” export: Budget Reporting Period, Due Date for Budget Items, Performance Reporting Period, Due Date for Performance Items, Budget Creation, Expense Creation, Performance Plan Creation, and Achievement Creation.

How to Import Awards

To import awards into the system:



Navigate to Fund Management > Awards.

1. Click the Import icon in the top-right action bar.
2. In the Award Import modal, select the Import Type: Award Import.
3. Click 'Choose a file' to upload your spreadsheet.
4. Click 'Import' to proceed.
5. The match key is used to link and identify the records to be updated. If no match key is identified (such as Grant ID), the import will create a new Award record.
 - Available match keys include Grant ID, Unique Identifier, and other supported award fields.
6. Map the columns from your spreadsheet to the corresponding fields in the system. The default auto-mapping option includes all required fields, including Award Status.
7. Review and confirm the import.

Match Key Behavior:

- Match key comparison ignores whitespace.
- Blank match key values are treated as inserts.
- A match key field cannot be set to null while it is selected as the match key.
- If there is only one Funding Source, default mapping works automatically.
- Records with multiple Funding Sources require:
 - Inserting extra columns into the Export file, see image below as example.
 - Upon import, manual mapping will be required for the added Funding Sources.

| Y | Z | AA | AB | AC | AD |
|---------------------|---------------------|-----------------------|-----------------------|-----------------------|-------------------------|
| Funding Source Type | Funding Source Name | Funding Source Amount | Funding Source Type 1 | Funding Source Name 1 | Funding Source Amount 1 |
| Fund | Test Fund 1 | 10000 | Fund | Test Fund 2 | 10000 |
| Fund | Test Fund 1 | 10000 | Fund | Test Fund 2 | 10000 |
| Fund | Test Fund 1 | 50000 | Fund | Test Fund 2 | 50000 |

Import Security for Funder Users:

When a funder uploads an award import spreadsheet, the following fields are not available for mapping and will not be modified: Recipient Manager, Recipient Name, and Recipient Additional Users.

Validation and Error Handling

The import process includes built-in validation to ensure data integrity:

Duplicate Match Keys in Spreadsheet: If duplicate match keys are found in the spreadsheet, the import will fail with an error message indicating the affected row.

Duplicate Match Keys in Euna Grants: If a match key matches multiple existing records in the system, the import will fail and an error will indicate that multiple target records were found.

Grant ID-Specific Rules:

- If Grant ID is the match key and values do not match, the import will fail.
- Grants or sub-awards with non-matching Grant IDs will fail with an “Award not found” error.
- If Grant ID is not the match key, non-matching values are treated as new records.
 - Is highly recommended to use the **Grant ID** as match key to prevent duplications or errors.

Automatic Grant-Funded Amount Updates

The Grant-Funded Amount (GFA) is calculated as the sum of all Funding Source Amounts. When an award is updated via import and changes are made to funding source amounts, the GFA is automatically recalculated. No manual re-save is required on the Award Details page.

Best Practices for Award Import/Export

- Use the “For Importing” export option to ensure your spreadsheet aligns with the import template format.
- Always verify your match key selection before importing to avoid unintended inserts or updates. Highly recommend using Grant Id as your match key.
- Filter the Awards grid before exporting to limit the export to the specific awards you want to update.
- Review your spreadsheet for duplicate match keys before importing to prevent import failures.

- For awards with multiple funding sources, manually map the columns during import to ensure accuracy.
- Back up your data before performing bulk imports to safeguard against errors.
- Use consistent naming conventions for award fields to make data management easier across imports and exports.