

TRACS Text Editor Narratives, Attachments, and PDF Output Job Aid

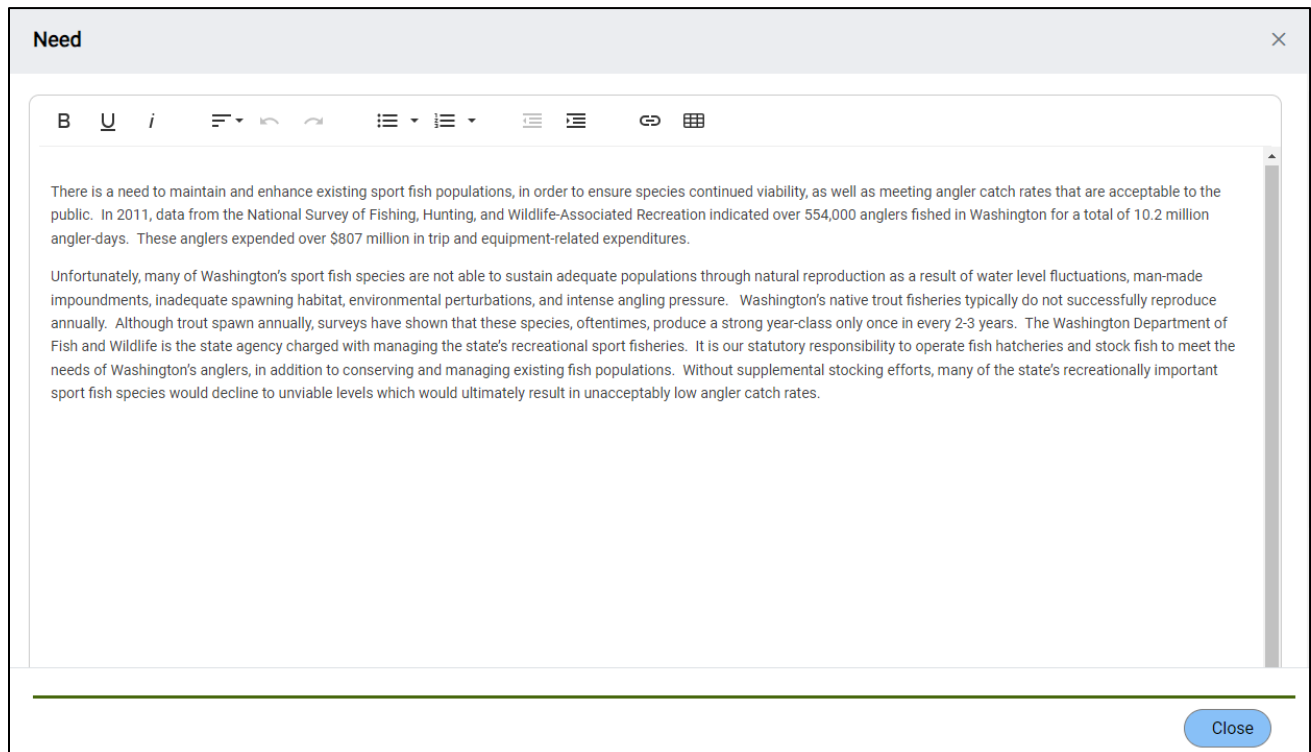
Updated 06/04/2024

Text Editor Narratives

Some fields require entry of narrative text and have a pop-up text editor window that opens when you click in the field. The text editor has a variety of formatting tools including from left to right: Bold, Underline, Italicize, Alignment, Undo/Redo, Bullet Points, Numbering, Indent Tools, Links, and a Table Builder.

Note that images will not display in the text box, and they will not copy/paste over with the text, instead any images or photos should be added as attachments.

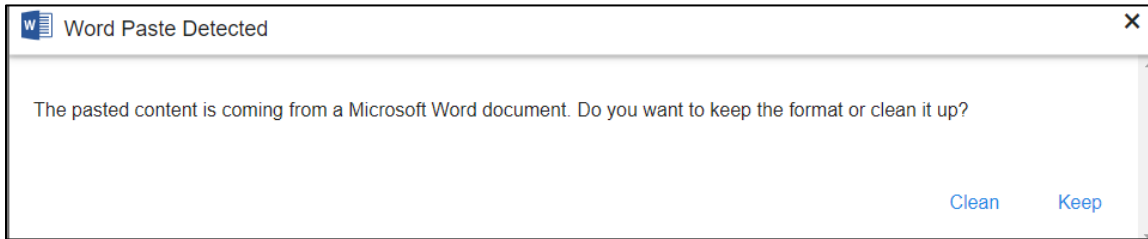
Note that text font, color, and size are not editable since these formatting options are preset to produce a standardized PDF output.



Tip - Use a Word document to copy and paste: Copy and paste from Word whenever possible. Some formatting issues may appear when copying and pasting from other sources, such as PDFs, webpages, etc.

Pasting from a Microsoft Word Document opens the formatting window with options to "Keep" or "Clean" formatting. "Keep" will keep formatting elements allowed by the text editor such as paragraph spacing in the Word document. The "Clean" option will remove extra characters, white space, or other formatting from the text. These options do not appear when pasting from any other file type besides Word (such as a PDF).

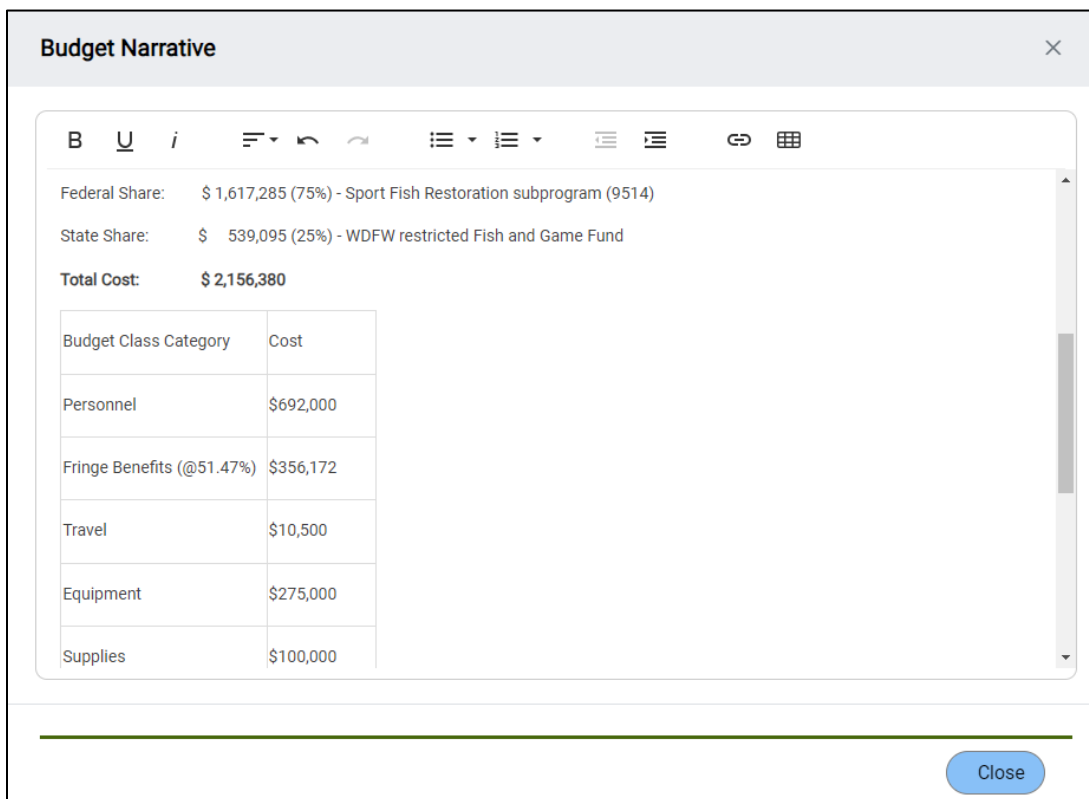
Tip: Use the “**Keep**” option first. If the text does not look right, remove the text, and paste it again choosing the “Clean” option.



Copy/Paste a Table: A table may be pasted into the text editor (or use the table tool to create a table). Tables will copy and paste best from Word or Excel files.

Note that large tables (containing more than 3-4 columns and or long text/numeric values) may not format correctly when copied and pasted into a narrative field. Check the PDF output to see how the table displays. If the table does not display correctly on the PDF, then remove it from the field and add it as a PDF attachment.

Note: If you copy from a Word document that has an Excel table that is embedded into Word, it will need to be opened in the Excel format to enable pasting (double-click on the embedded table to open it).



Tip: Check the PDF for formatting issues that may need to be fixed. Make changes in the text editor, such as paragraph alignment issues and extra spaces.

Add and Manage Attachments



TRACS allows an unlimited number of attachments and a variety of attachment types. However, each attachment must be uploaded individually (no bulk upload available).

Valid attachment file type extensions include: .pdf, .gif, .jpeg, .png, .doc/.docx and .xls/.xlsx. Note that only PDFs and images (.gif, .jpeg, .png) will display in-line in the PDF outputs! Convert files to a PDF format before uploading as an attachment in order to display in-line in the TRACS-generated PDF outputs (such as the Grant Proposal PDF or Performance Report PDF). Word and Excel files (.doc/.docx, .xls/.xlsx) will not display in TRACS generated PDF reports but are accessible via a table with download hyperlinks. TRACS does not allow attachments with other file extension types, so convert other types (such as PowerPoint presentations) to a PDF to attach it in TRACS.

Attachments are optional in most cases. The Federal Award Indirect Cost Statement is the only field in TRACS that requires an attachment. For more info, review the [Upload Indirect Cost Statement Job Aid](#). For all other fields, attachments are optional, but are recommended especially if they provide supporting documentation and/or highlight the accomplishments of the grant.

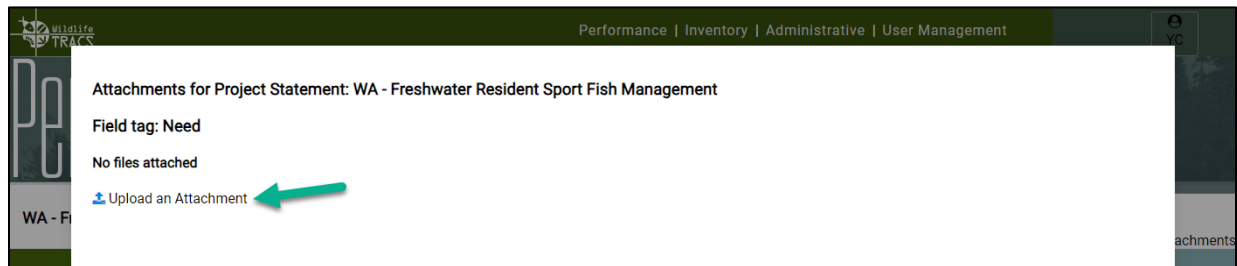
Can I simply attach documentation instead of filling out a field (or just type "see attachment")?

No. Attachments should not be used in place of the narrative field! Attachments are used to upload supporting documentation, such as images, photos, tables, research data, articles, reports, etc. The narrative fields in TRACS should be complete and concise but may reference additional supporting attachments. Tip: Lengthy and complex narratives with special formatting can be saved as a PDF and attached as supporting documentation (rather than copying and pasting into the field, which will lose some formatting elements). The field should still include a short summary.

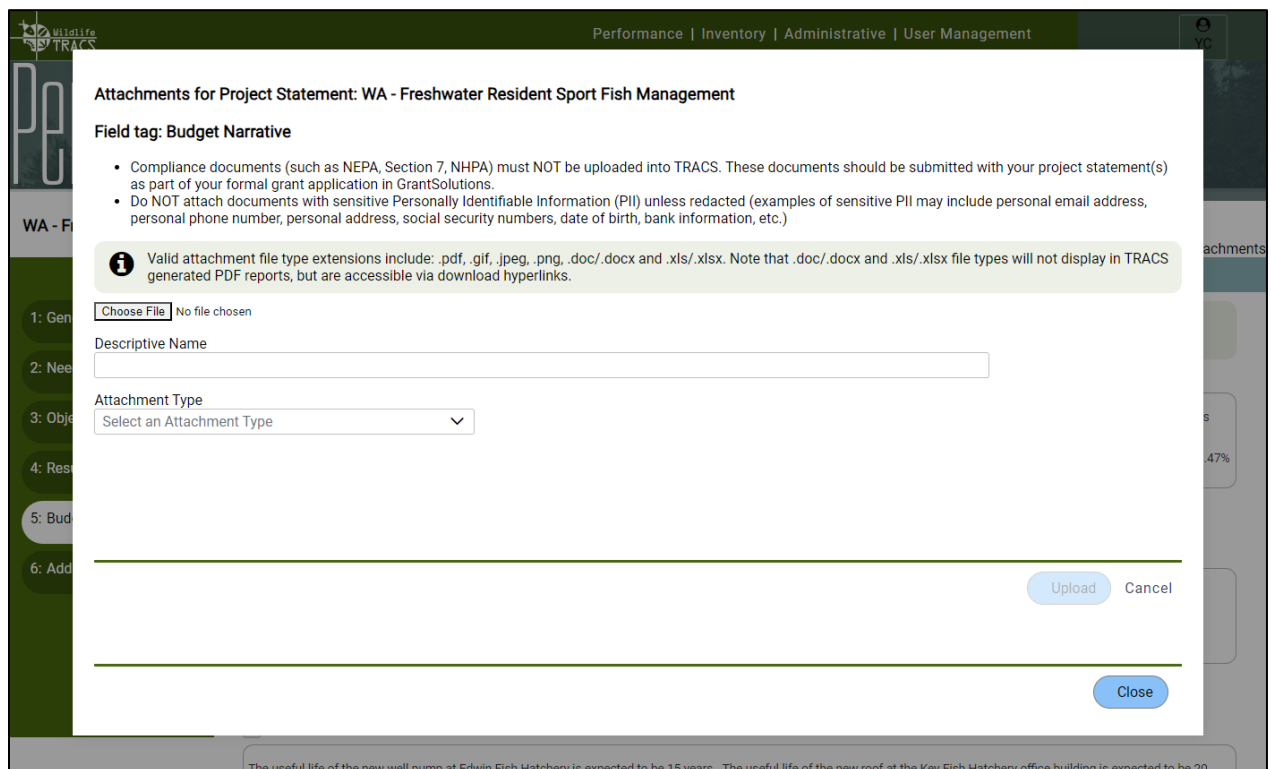
1. Attachments may be added to narrative and comment fields in TRACS, including in the Proposal (which includes Project Statements and Objectives), Performance Reports, Real Property Records, and Facility Records. Click on the **"View/Attach Files (optional)"** link below a narrative field. Alternately, click on **"Manage Attachments"** in the upper right of the workflow page.

The screenshot shows the TRACS Performance page for 'WA - Freshwater Resident Sport Fish Management 2021 - 2023'. The page has a green header with the TRACS logo and navigation links: Performance | Inventory | Administrative | User Management. A green arrow points to the 'Manage Attachments' link in the top right corner. The main content area is titled 'Performance' and shows a 'Need & Purpose' section. The text in the 'Need' section reads: 'There is a need to maintain and enhance existing sport fish populations, in order to ensure species continued viability, as well as meeting angler catch rates that are acceptable to the public. In 2011, data from the National Survey of Fishing, Hunting, and Wildlife-Associated Recreation indicated over 554,000 anglers fished in Washington for a total of 10.2 million angler-days. These anglers expended over \$807 million in trip and equipment-related expenditures. Unfortunately, many of Washington's sport fish species are not able to sustain adequate populations through natural reproduction as a result of water level fluctuations, man-made impoundments, in-stream habitat, environmental perturbations, and intense angling pressure. Washington's native trout fisheries typically do not successfully reproduce.' A green arrow points to the 'View / Attach Files (optional)' link at the bottom of the text field.

- The attachments window will appear displaying any existing attachments attached to the record. To add a new attachment, click on the "Upload an Attachment" link.



- The attachment upload page opens, displaying important information at the top of the page.



- Compliance documents (such as NEPA, Section 7, NHPA) must NOT be uploaded into TRACS.** These documents should be submitted with your project statement(s) as part of your formal grant application in GrantSolutions.
- Do NOT attach documents with sensitive Personally Identifiable Information (PII) unless redacted.** Examples of sensitive PII include personal email address, personal phone number, personal address, social security numbers, date of birth, bank information, etc. Note that business/work information (such as a business/work email address and phone number for agency staff) do not need to be redacted. Either PII information should be redacted if it is to be stored in TRACS, or the sensitive documents should be stored as hard copy in the permanent administrative record.

4. Fill out the attachment details in the following order:
 - Click on "Choose Files" to select a file from your computer. Note that only one attachment may be added at a time!
 - Enter or update the filename to be easily identifiable (ex. Budget Table WA Sportfish Grant)
 - Select the Field Tags to associate the attachment with a particular field – this option is only available if you add a general attachment using the "Manage Attachments" option. The field tags are specific to the form (i.e., grant proposal or project statement).
 - Select the Attachment Type. The attachment type is important because it identifies what the attachment is, such as an indirect cost statement, budget table, before or after photo, etc.
NOTE: If uploading the Indirect Cost Statement, make sure to select the Attachment Type as "Grant Indirect Cost PDF Attachment".
 - Click the "Upload" button. Note that the system may time out trying to upload files larger than 50 MB. If you need assistance uploading an attachment, please contact the TRACS Help Desk.

Attachments for Project Statement: WA - Freshwater Resident Sport Fish Management

Field tag: Budget Narrative

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- Do NOT attach documents with sensitive Personally Identifiable Information (PII) unless redacted (examples of sensitive PII may include personal email address, personal phone number, personal address, social security numbers, date of birth, bank information, etc.)

i Valid attachment file type extensions include: .pdf, .gif, .jpeg, .png, .doc/.docx and .xls/.xlsx. Note that .doc/.docx and .xls/.xlsx file types will not display in TRACS generated PDF reports, but are accessible via download hyperlinks.

[Choose File](#) Sample Budget.docx

Descriptive Name

Attachment Type

[Upload](#) [Cancel](#)

5. The attachment will display in the table. In the actions column on the right, select "Edit Properties" or "Delete" if needed ("Remove from field" will also display if the attachment is linked to a particular field). Click on the filename with the arrow icon to download the file. Use the "Upload an Attachment" option to continue to add more attachments, then click "close".

Attachments for Project Statement: WA - Freshwater Resident Sport Fish Management

Field tag: Budget Narrative

Attachments			
Descriptive Name ↑↓	Field Tags	Attachment Type ↑↓	Actions
Sample Budget Ⓞ	Budget Narrative	Budget / Budget Table	Remove from Field Delete Edit Properties
Upload an Attachment			

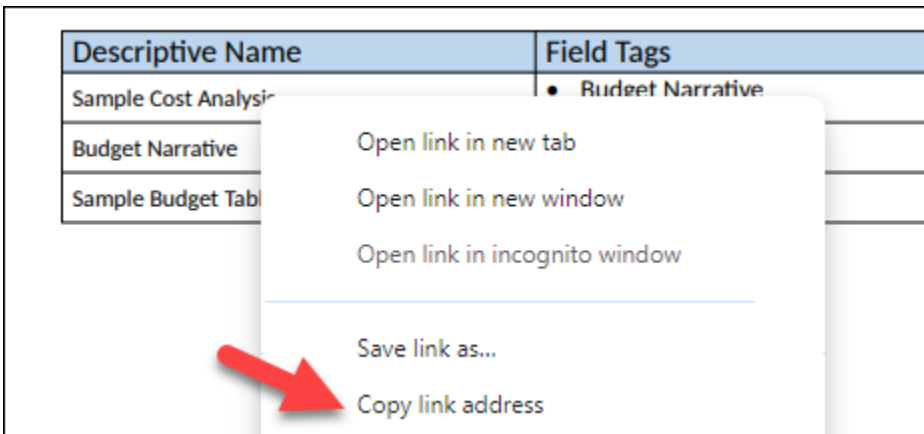
6. Attachments display in PDF outputs generated from TRACS in the Attachments Tables by section.
- For the Federal Award Proposal PDF, attachment tables are available for the Objective Attachments, Grant Detail Attachments, and Project Statement Attachments.
 - For Performance Reports PDFs, attachment tables are available for Activity Performance Attachments and Questionnaire Attachments.

Example of Attachments displayed in the PDF:

Project Statement Attachments		
Note: Some attachments listed here may not appear in the Appendix due to file incompatibility. All attachments can be accessed using the links below.		
Descriptive Name	Field Tags	Attachment Type
Sample Cost Analysis	• Budget Narrative	Budget / Cost Analysis
Budget Narrative	• Useful Life Narrative	Budget / Budget Table
Sample Budget Table	• Budget Narrative	Budget / Budget Table

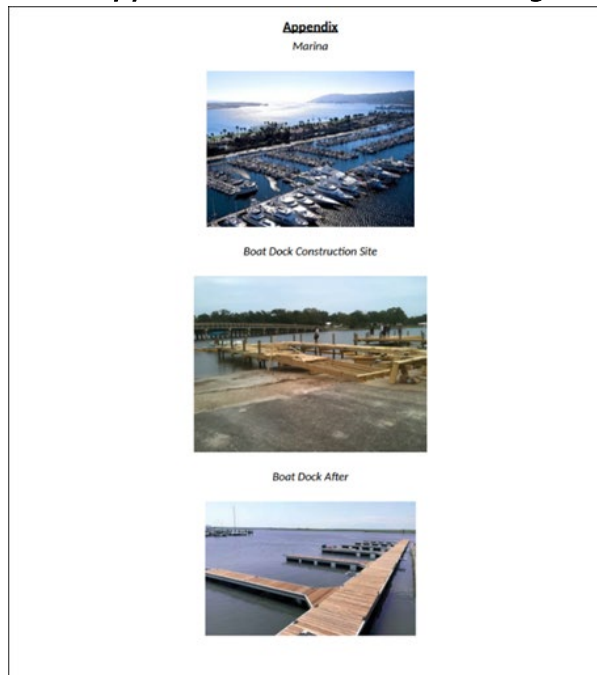
The Descriptive Name is also a link to the attachment.

Tip: Right-click on the attachment name (in the Descriptive Name column) and select "Copy link address". The link can be added to the narrative field.



Some attachments are displayed in-line in the Appendix section of the PDF output. The Appendix section includes attachments in line in the document for certain file type extensions: PDFs (.pdf) and images (.gif, .jpeg, .png).

Example of an Appendix in the PDF with images displayed:



Note that image files are scaled down in the Appendix. If images need to be larger or need additional captions, add them as a PDF instead. Tip: For best results, do NOT convert image files directly to PDF. Instead, open a new Word document and insert the images, then adjust size and add any text/captions needed before saving the Word document as a PDF for upload into TRACS.

Note that not all attachment types are incorporated into the appendix. Word documents (.doc/.docx) and Excel spreadsheets (.xls/.xlsx) may be uploaded as attachments but will not display in the Appendix. Instead, they appear in the Attachments table as downloadable hyperlinks.

TIP: For in-line display, save a Word or Excel document as a PDF and upload into TRACS.

TRACS Generated PDF Outputs

TRACS generated PDFs are available for the following records in TRACS:

- Performance Module
 - **Federal Award Proposal PDF** (which includes all Project Statements)
 - Note that a PDF is not available by individual project statement.
 - The Federal Award Proposal PDF is available on the Grant list page, Project Statements list page, and Project Statement Approval page.
 - **Interim Performance Report PDF** (which includes all project statements in the interim period of performance)

- **Final Performance Report PDF** (which includes all project statements in the final period of performance and a summary table for all periods of performance)
- Inventory Module
 - **Site with Facility Inventory Records PDF** (which includes all Facility Records attached to the site)
 - **Facility Inventory Record PDF** (which includes the base/original record and any adjustment records)
 - **Real Property Inventory Record PDF** (which includes the base/original record, as well as any adjustment records and corrective actions)
 - **Real Property Status Report PDF**

The TRACS Working Group designed the PDF templates to auto-generated standardized PDF outputs from TRACS in order to provide a product that grant recipients can use outside of TRACS, and improve issues related to organization, font, and formatting discrepancies. PDF output highlights:

- A cover page with logos of the Office of Conservation Investment and U.S. Fish and Wildlife Service, as well as the watermark for the Department of the Interior.
- Headers and footers to display document type, page titles, page numbers (starting on the first page after the cover page), and the date the document was generated.
- Table of Contents (TOC) with smart links, and items (such as objectives) are listed in alpha-numeric order.
- PDF and image attachments included in an auto-generated appendix (other attachment types included as links).

