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Create your own Word Merged document in eSRA using templates and Word Merge field lists available at eSRA.lbl.gov/forms.

Use the 'Merge Word Document' activity on the specific proposal, award, or modification that contains the data for the merged document.



Scenario 1: Prepared Word Merge template

1. Retrieve the template document from the Forms section of the informational website. (For example: 700-U)
2. Save the template on your network or hard drive.
3. Open the proposal/award/modification workspace and use the activity 'Merge Word Document.'
4. Upload your template and click 'OK.'
5. Retrieve the completed document from history.

Scenario 2: Create your own Word Merge template

1. Create your Word document template saved on your network or hard drive.
2. Embed the eSRA merge fields into your document by copying the merge fields available from either the proposal or award list into your template.

Lists available at eSRA.lbl.gov/forms

- W Award Word Merge Master List.docx
- W Proposal Word Merge Master List.docx

You must copy and paste the field into your document. Don't just type the information. These fields contain metadata that is part of the merge feature identifying them as merge fields with eSRA as the source. Example only (more fields are available)

Display Name in Proposal View	Merge Field (copy paste into your document)	Source of data (for reference only)
Full Proposal Title Copy the entire merge field	«description»	View 1.0, question 1.d
PI	«_attribute0.fullName()»	View 1.0, question 1.e
Resource Analyst(s)	«getResourceAnalysts()»	View 1.0, question 1.h.1
Submission Deadline	«pageNonIndustry_attribute1»	View 2.0 or 2.9, question 2.c
Application Type	«internalSubmissionType.displayValue»	View 2.0 or 2.9, question 2.d
Public Statement of Work	«proposalData.proposalAbstract»	View 2.0 or 2.9, question 2.e

3. Open the proposal/award/modification workspace and use the activity 'Merge Word Document.'
4. Upload your personal template and click 'OK.'
5. Retrieve the completed document from history.

Tips and Hints

- Select fields from the proposal or award lists, but not both, for your document.
- Copy the merge field from the list, so you get the embedded code. Do not type it into your document. Assistance for creating Word Merge templates is available in the help section of Word.
- If you have trouble or need one-on-one training for this functionality, contact the eSRA Help Desk.