

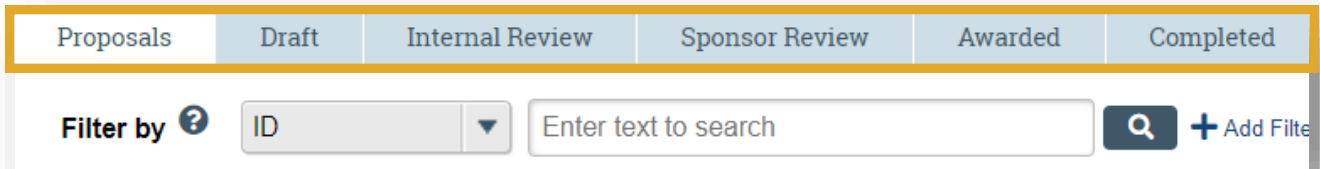


RAMP Reports

In this guide we will explore some of the key basic reports available to users in RAMP. In addition to custom reports available, we will learn how individuals can create their own reports from either the Funding Proposal or Awards home pages, or their own Dashboard, for records they have access to.

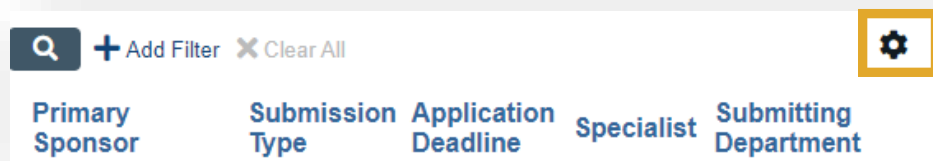
Create a Report from the Funding Proposal Dashboard

Individuals have the ability to create their own reports from the Funding Proposal dashboard. The report will include all records they have access to. Select a status tab for which you would like to create a report for.



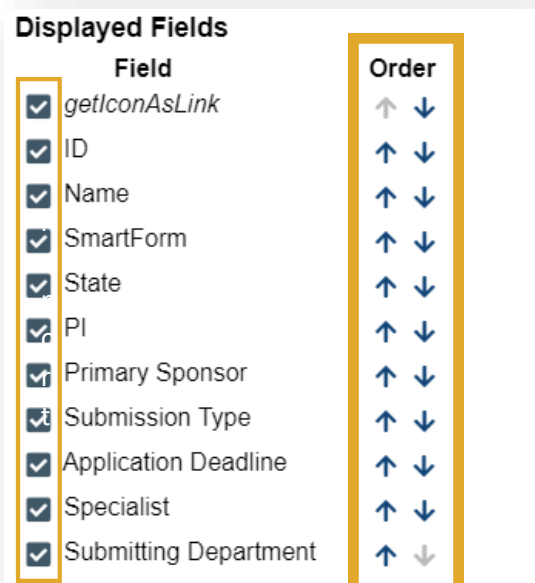
The screenshot shows a navigation bar with six tabs: Proposals, Draft, Internal Review, Sponsor Review, Awarded, and Completed. Below the tabs is a filter bar with the text "Filter by" followed by a dropdown menu currently set to "ID", a search input field with the placeholder "Enter text to search", a search icon, and a "+ Add Filter" button.

Select the cog icon from the chosen Funding Proposal status tab.



This screenshot shows a close-up of the filter bar. It includes a search icon, "+ Add Filter", and "x Clear All" buttons. A gear icon (cog) is highlighted with a yellow box. Below the filter bar, a list of fields is visible: Primary Sponsor, Submission Type, Application Deadline, Specialist, and Submitting Department.

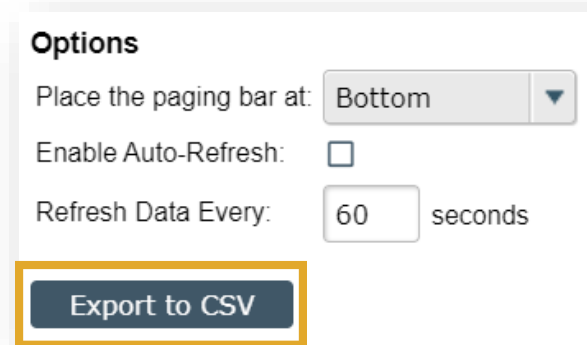
From the slide-out, select which fields you would like to have included in your report. Users have the ability to change the order of the chosen displayed fields.



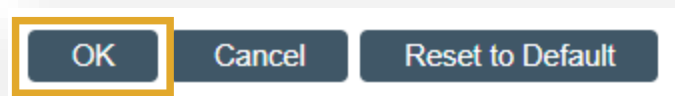
The screenshot shows a "Displayed Fields" configuration panel. It has two columns: "Field" and "Order". The "Field" column contains a list of fields, each with a checked checkbox. The "Order" column contains up and down arrow icons for each field, indicating they can be reordered. A yellow box highlights the "Field" column, and another yellow box highlights the "Order" column.

Field	Order
<input checked="" type="checkbox"/> <i>getIconAsLink</i>	↑ ↓
<input checked="" type="checkbox"/> ID	↑ ↓
<input checked="" type="checkbox"/> Name	↑ ↓
<input checked="" type="checkbox"/> SmartForm	↑ ↓
<input checked="" type="checkbox"/> State	↑ ↓
<input checked="" type="checkbox"/> PI	↑ ↓
<input checked="" type="checkbox"/> Primary Sponsor	↑ ↓
<input checked="" type="checkbox"/> Submission Type	↑ ↓
<input checked="" type="checkbox"/> Application Deadline	↑ ↓
<input checked="" type="checkbox"/> Specialist	↑ ↓
<input checked="" type="checkbox"/> Submitting Department	↑ ↓

Next, at the bottom of the pop-out window you'll notice an **Export to CSV** button. Only select this button when looking to export data as an excel file.



When data is not being exported, select **OK**.



Create a Report from the Awards Dashboard

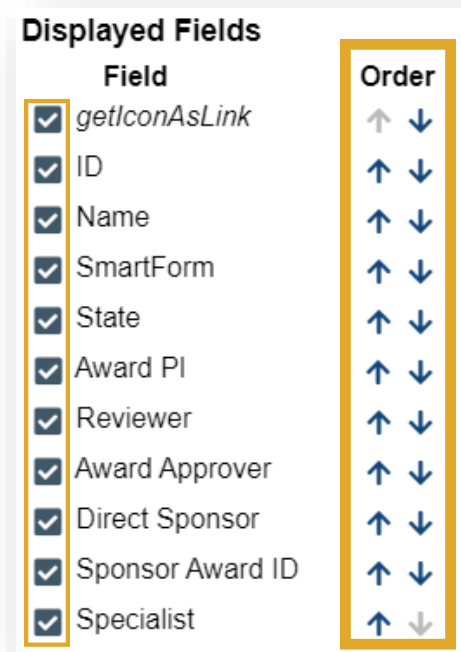
Individuals have the ability to create their own reports from the Awards dashboard. The report will include all records they have access to. Select a status tab for which you would like to create a report for.

Awards									
Awards	Active Awards	Advance Account	Draft Awards	Awards in Review	Subawards	...			
Filter by ? ID ▼ Enter text to search 🔍 + Add Filter ✕ Clear All ⚙️									
ID	Name	SmartForm State	Award PI	Reviewer	Award Approver	Direct Sponsor	Sponsor ID	Award ID	Specialist
AWD00000626	NEH/Mapping '26 US Religious Census	[Edit] ▼	Draft Mullen		Huettl	National Endowment for the Humanities	PW-290435-23		Gonzalez

Select the cog icon from the chosen Awards status tab.

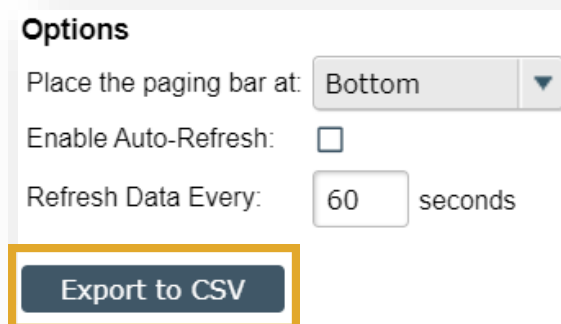
Filter by ? ID ▼ Enter text to search 🔍 + Add Filter ✕ Clear All ⚙️									
ID	Name	SmartForm State	Award PI	Reviewer	Award Approver	Direct Sponsor	Sponsor ID	Award ID	Specialist

From the slide-out, select which fields you would like to have included in your report. Users have the ability to change the order of the chosen displayed fields.



Field	Order
<input checked="" type="checkbox"/> <i>getIconAsLink</i>	↑ ↓
<input checked="" type="checkbox"/> ID	↑ ↓
<input checked="" type="checkbox"/> Name	↑ ↓
<input checked="" type="checkbox"/> SmartForm	↑ ↓
<input checked="" type="checkbox"/> State	↑ ↓
<input checked="" type="checkbox"/> Award PI	↑ ↓
<input checked="" type="checkbox"/> Reviewer	↑ ↓
<input checked="" type="checkbox"/> Award Approver	↑ ↓
<input checked="" type="checkbox"/> Direct Sponsor	↑ ↓
<input checked="" type="checkbox"/> Sponsor Award ID	↑ ↓
<input checked="" type="checkbox"/> Specialist	↑ ↓

Next, at the bottom of the pop-out window you'll notice an **Export to CSV** button. Only select this button when looking to export data as an excel file.



Options

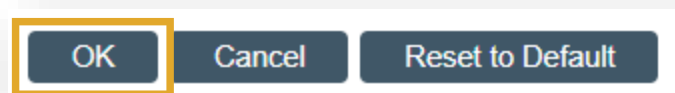
Place the paging bar at: ▼

Enable Auto-Refresh:

Refresh Data Every: seconds

Export to CSV

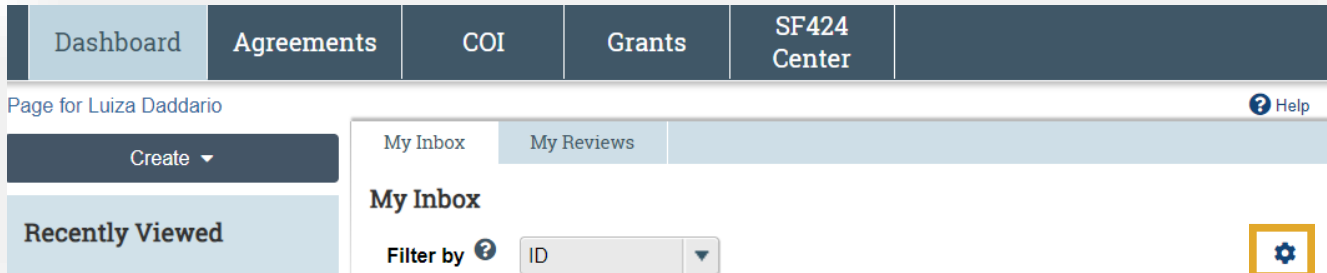
When data is not being exported, select **OK**.



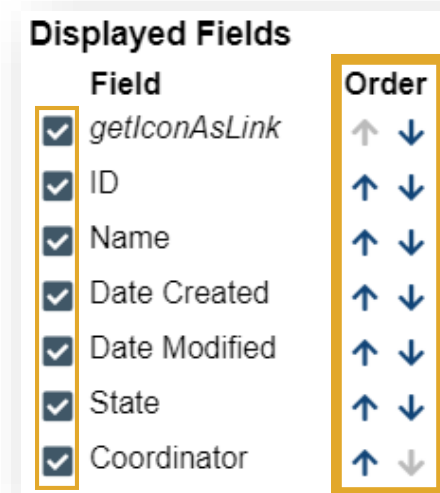
OK **Cancel** **Reset to Default**

Create a Report from the Main Dashboard

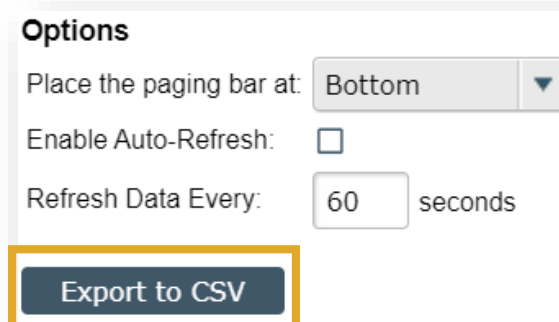
Individuals have the ability to create their own reports from the Main Dashboard. The report will include all records they have access to. Select the cog icon.



From the slide-out, select which fields you would like to have included in your report. Users have the ability to change the order of the chosen displayed fields.



Next, you'll notice an **Export to CSV** button. Only select this button when looking to export data as an excel file.



When data is not being exported, select **OK**.



Helpful Tips

- 1. Reports generated in RAMP and not exported have live links to the records.** When a user generates their report, depending on the fields included in the report, certain fields like the Funding Proposal ID appear as links. The link will open a new window and bring users directly to the associated Funding Proposal or Award record.
- 2. Export CSV and save as excel worksheet if wanting to save the report.** RAMP offers an option for users to export the report. This may be useful when sorting data. Since an exported excel file is not a living document, it will not be updated regularly therefore it is advised that users download a new version each time they reference a report.
- 3. After exporting report, format with the following: Filter, Freeze Top Row, AutoFit Columns, AutoFit Rows.**

When downloading an excel copy of the report, a few key tips are to format the excel spreadsheet to make it more easily viewable.

[Create and format tables](#)

[Sort data in a table](#)

[Filter data in a range or table](#)

[Total the data in an Excel table](#)

[Use slicers to filter data](#)

[Freeze panes tutorial](#)