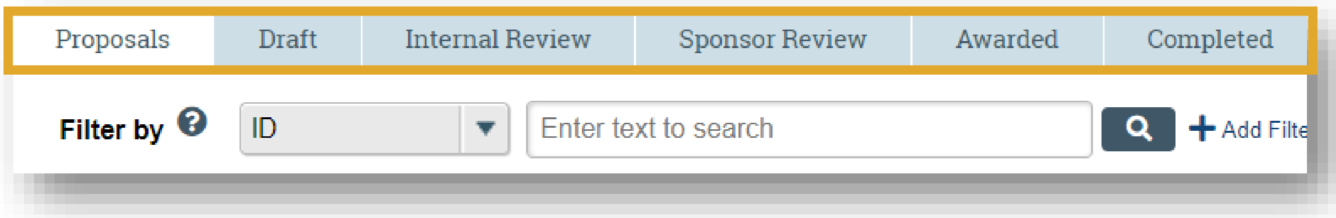
RAMP Reports

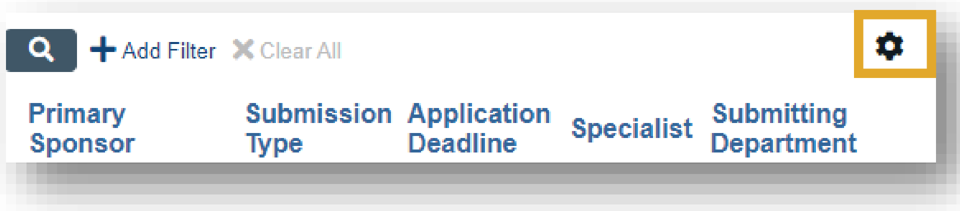
In this guide we will explore some of the key basic reports available to users in RAMP. In addition to custom reports available, we will learn how individuals can create their own reports from either the Funding Proposal or Awards home pages, or their own Dashboard, for records they have access to.

Create a Report from the Funding Proposal Dashboard

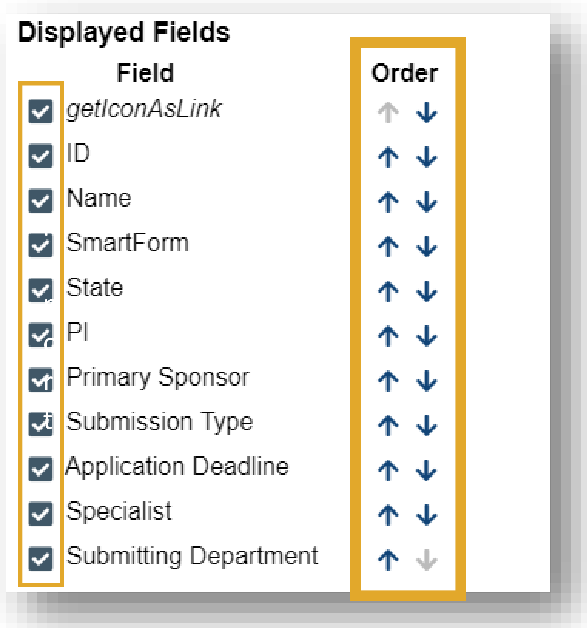
Individuals have the ability to create their own reports from the Funding Proposal dashboard. The report will include all records they have access to. Select a status tab for which you would like to create a report for.



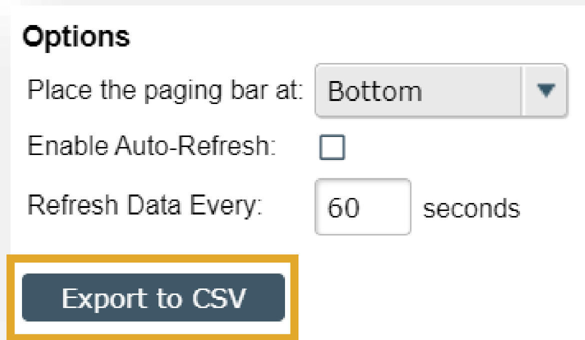
Select the cog icon from the chosen Funding Proposal status tab.



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.



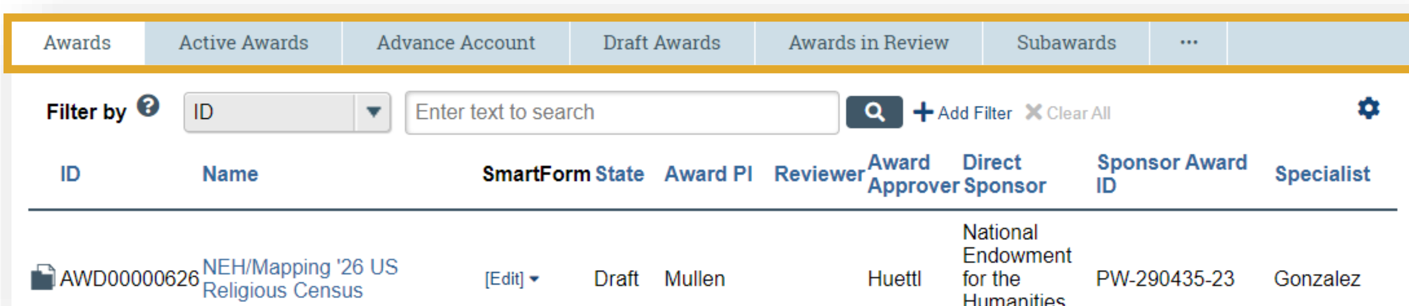
Next, at the bottom of the pop-out window you'll notice an **Export to CSV** button. Only select this button when looking to export data as an excel file.



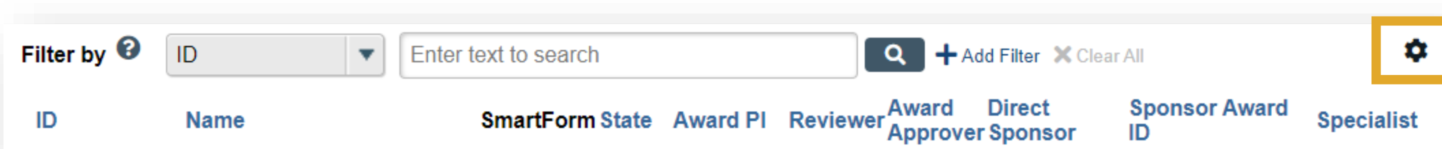
When data is not being exported, select **OK**.

Create a Report from the Awards Dashboard

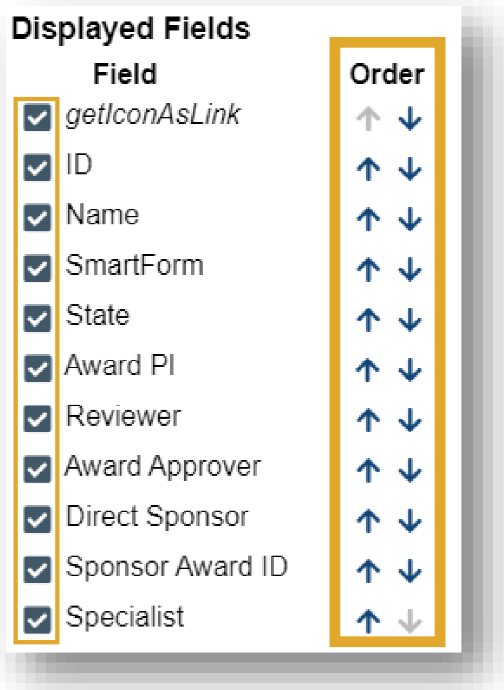
Individuals have the ability to create their own reports from the Awards dashboard. The report will include all records they have access to. Select a status tab for which you would like to create a report for.



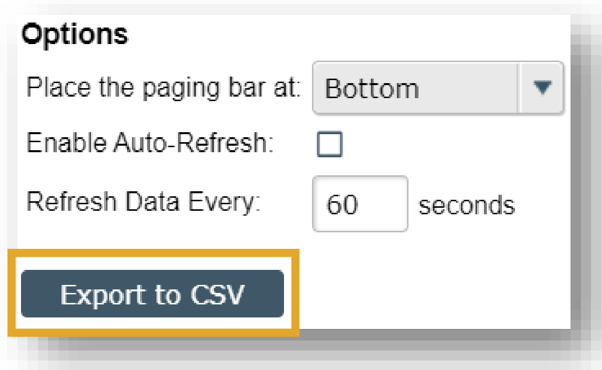
Select the cog icon from the chosen Awards status tab.



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.



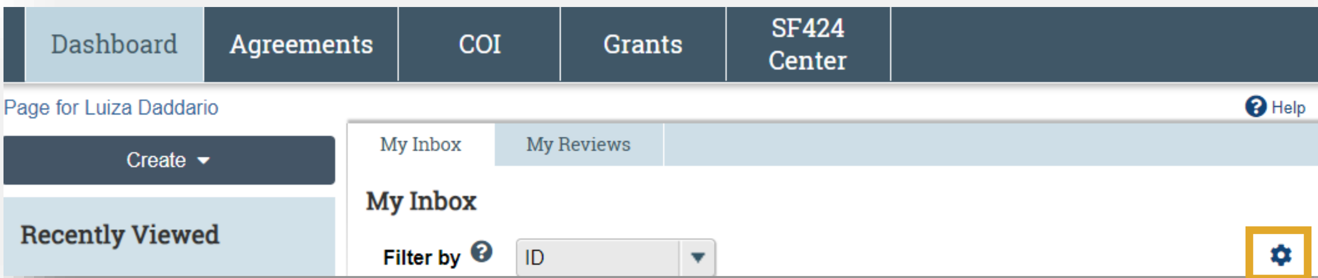
Next, at the bottom of the pop-out window you'll notice an **Export to CSV** button. Only select this button when looking to export data as an excel file.



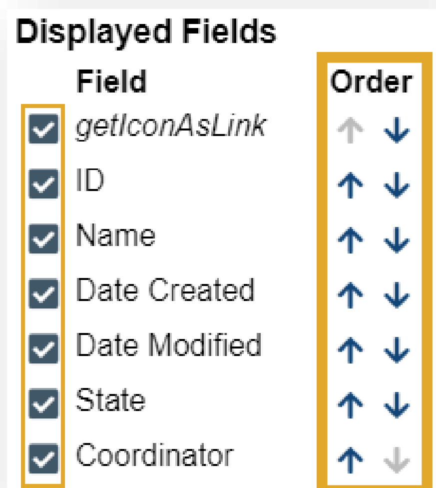
When data is not being exported, select **OK**.

Create a Report from the Main Dashboard

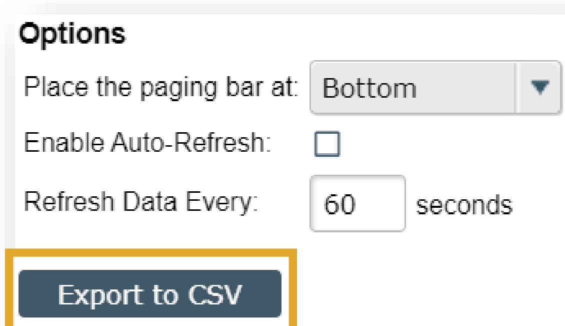
Individuals have the ability to create their own reports from the Main Dashboard. The report will include all records they have access to. Select the cog icon.



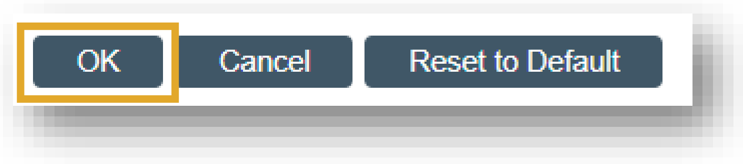
From the slide-out, select which fields you would like to have included in your report. Users have the ability to change the order of the chosen displayed fields.



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