How to Search and Sort Records

Security Role(s): Study Staff – All UW Employees will have this role.

The Dashboard, Grants module, Agreements module, and Export Control module pages are all Workspaces (projects also have a Workspace as outlined below). This subsection outlines how to search, filter, and sort the records listed on a Workspace. The directions use Grants module examples; however, all areas of RAMP can be searched and filtered using the methods described below.

Section #1: Search Using One Field

1. Use the Filter by fields to search for a record by various information (e.g., ID, Name, State, etc.).

2. This guide covers the two most common searches. Press the Help text icon for more information about search options.

3. The most common searches are:
   a. **Search for key words** – Use the wild care feature by entering a “%” sign before the key word. In the example below, the user searched for the word “heart” in the direct sponsor by selecting “Direct Sponsor” in the Filter by drop-down list and entering “%heart” in the search field.
b. **Search excluded key words** – Enter "!=" prior to the key word. In the example below, the user excluded proposals in the Not Funded state by selecting “State” in the Filter by drop-down list and entering "!=not funded" in the search field.

Select the **Search icon** to complete the search and select **Clear All** to clear the search and return to the full record listing.

**Section #2: Search Using Multiple Fields**

1. To search records using multiple **Filter by** fields, select **Add Filter**, add the search criterion for each field, and select the **Search icon** to complete the search.
2. Select **Remove Filter** to remove a filter from a search.

**Section #3: Sorting Records**

1. Records can be sorted by most column headings (blue column headings are sortable).
2. To sort records, hover over the sortable column header with a cursor until the hand icon appears and then select the **column header name** to sort the column.
3. To reverse the sort order, select the **column header name** again.