

RAMP - Research Administration Management Portal

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

Proposals									
Draft Internal Review Sponsor Review Awarded Completed Selected									
Filter by ? Direct Sponsor ▼ %heart 🔍 + Add Filter ✕ Clear All ⚙️									
ID	Name	SmartForm State	PI	Direct Sponsor	Submission Type	Application Deadline	Specialist	Submitting Department	
FP00000147	American Heart Association Proposal	[Edit] ▼	Award Notification Received	KAWAOKA	AMERICAN HEART ASSOCIATION	Funding Submission	8/24/2022	MCMILLEN	PATHOBIOLOGCL SCI*PBS-ADMIN
FP00000141	BJB non-fed example	[Edit] ▼	Draft	PI (2)	AMERICAN HEART ASSOCIATION	Funding Submission		Proposal Team	MEDICINE*GER-AD DEV

2 items ⏪ page 1 of 1 ⏩ 25 / page

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.

Proposals									
Draft Internal Review Sponsor Review Awarded Completed Selected									
Filter by ? State ▼ !=not funded 🔍 + Add Filter ✕ Clear All ⚙️									
ID	Name	SmartForm State	State	PI	Direct Sponsor	Submission Type	Application Deadline	Specialist	Submitting Dep
FP00000033-Res2	DDH testing Issues00070680 - Resubmission - 1	[Edit] ▼	Draft		ADMINISTRATION*RSRCH SERV	Resubmission	6/23/2023	Proposal Team	PATHOBIOLOGCL ADMIN
FP00000145-Rev1	KM CTA Demo - Revision - 1	[Edit] ▼	Draft		GLAXOSMITHKLINE	Revision	2/28/2023	Proposal Team	PATHOBIOLOGCL ADMIN
FP00000145	KM CTA Demo	[Edit] ▼	Awarded		GLAXOSMITHKLINE	Funding Submission	8/22/2022	Proposal Team	PATHOBIOLOGCL ADMIN
FP00000320	PR Test-Renewal	[Edit] ▼	Proposal Status Confirmation		LUPUS FOUNDATION OF AMERICA, INC	Renewal	4/1/2023	Proposal Team	PATHOBIOLOGCL ADMIN

- 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.

Proposals	Draft	Internal Review	Sponsor Review	Awarded	Completed	Selected					
Filter by		State	!=not funded			+ Add Filter	X Clear All				
ID	Name	SmartForm	State	PI	Direct Sponsor	Submission Type	Application Deadline	Specialist	Submitting Department		
FP00000033-Res2	DDH testing Issues0070680 - Resubmission - 1	[Edit]	Draft		ADMINISTRATION*RSRCH SERV	Resubmission	6/23/2023	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000145-Rev1	KM CTA Demo - Revision - 1	[Edit]	Draft		GLAXOSMITHKLINE	Revision	2/28/2023	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000145	KM CTA Demo	[Edit]	Awarded		GLAXOSMITHKLINE	Funding Submission	8/22/2022	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000320	PR Test-Renewal	[Edit]	Proposal Status Confirmation		LUPUS FOUNDATION OF AMERICA, INC	Renewal	4/1/2023	Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		

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

Proposals	Draft	Internal Review	Sponsor Review	Awarded	Completed	Selected					
Filter by		State	Pending		+ Add Filter	X Clear All					
and by		Direct Sponsor	%science	X Remove Filter							
ID	Name	SmartForm	State	PI	Direct Sponsor	Submission Type	Application Deadline	Specialist	Submitting Department		
FP00000284-Con1	DDH 1-17-23 Demo Prep - Continuation	[Edit]	Pending Sponsor Review		NATIONAL SCIENCE FOUNDATION	Continuation		Proposal Team	PATHOBIOLOGCL SCI*PBS-ADMIN		
FP00000199	DDH Compliance Page Demo_10-17-2022	[Edit]	Pending Sponsor Review		NATIONAL SCIENCE FOUNDATION	Funding Submission	10/24/2022	Proposal Team	PHYSICS*PHYSICS		
2 Items				page 1 of 1				25 / page			

- 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.
- Select **Remove Filter** to remove a filter from a search.

Section #3: Sorting Records

- Records can be sorted by most column headings (blue column headings are sortable).

ID	Name
AGR00000084	Agreement for: DDH Advance Account Demo_20220811
AGR00000142	Agreement for: DDH copy to see if endorsement letter copies

- 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.
- To reverse the sort order, select the **column header name** again.