AmpliFund

Reports User Guide

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AmpliFund

Reports Overview

The *Reports* module supports pre-award and post-award grant, project, recipient and sub-recipient, fund and opportunity, and time and effort reporting.

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Report Features

The AmpliFund Reporting Engine allows users to run and view reports for selected objects, search within the report for key terms, filter data, show or hide columns, save formatting, and export reports and data.

How To Run a Report

Reports will run automatically when opened. If the user has saved formatting or filtering changes as a user report, those changes will be shown by default.

1. Open **Reports**.
2. Click the ▸ **(Expand icon)** next to report type to expand reports list.
3. Click a **report name**.

How To View a Report for a Specific Record

Reports run for all records by default. To view individual record reports, use the page navigation in the top-right area of the report or use the report filter.
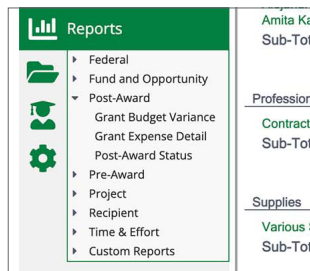
1. Run a **report**.
2. Click the › **(Next Page icon)** to view the next record report, or select the **record** from the record type dropdown in the Filters section.
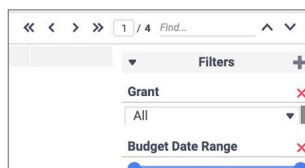
How To Search a Report

Users can search for key terms within report data. This will highlight the term's locations on the report page. These locations can then be toggled through with the ⌃ (Search Up icon) and ⌄ (Search Down icon).

1. Run a **report**.

2. Add a **search term** in the *Find...* field.

3. Click the ✔ **(Search Down icon)** to view the next location of the term across the report pages.

How To Filter Report Data

The Filter section will appear on the right side of each report by default; it can be shown or hidden by clicking the four dots to the right of the report. From the filter section, users can drilldown into data type as well as show and hide columns.

1. Run a **report**.

> **❗ Note**
> Users can also click and drag the dots to resize the filter width.

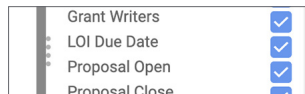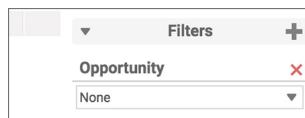2. Click the **four dots** to the right of the report to show the Filter, if necessary.

3. Click the **+ (Add Item icon)** to add additional filters, or click the **✗ (Delete Item icon)** to remove filters. Filters are hierarchical, so the topmost filter will be applied to all data and subsequent filters will be applied to that subset of data.

> **❗ Note**
> For budget dates, the endpoint will show the last day of the allocation for the month, but the entire month will be included in the filter.

4. To filter by date, slide the **endpoints** of the Date Range slider. The dates are populated with dates from the filtered objects, such as grant or allocation dates.
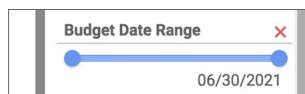
5. To filter by multiple values, check the **checkboxes**. If a box is checked, data matching the selected criteria will be shown.

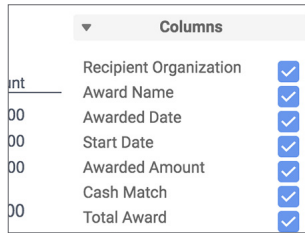6. To show or hide columns, check or uncheck the **checkbox** next to a column name, respectively.
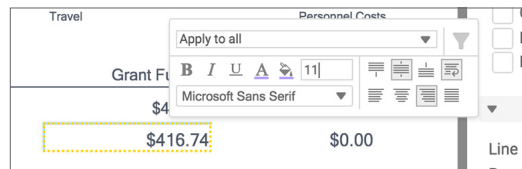

How To Change Report Formatting

Users can update report formatting such as column width; font; bold, italic, and underline; font color; font size; cell color; and cell alignment.

1. Run a **report**.

2. To adjust column width, hover over **gray area** above report and drag column edges.

3. Right click the **column or column header** to change.

4. In the pop-up menu, update information as necessary.

How To Remove Changes to Formatting or Filtering

Users can remove changes to styling, column visibility, or both.

1. Run a **report**.

2. Click the ⊗ **(Clear Options icon)** in the top-left area of the report.

3. In the menu, select the **type of changes** to clear.
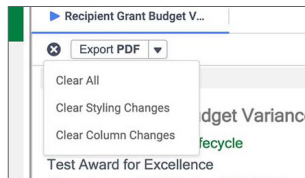
How To Save Changes to Formatting or Filtering

Users can save their formatting and filtering changes as user report. Once saved, this user report will load by default any time the report is run by the user.

1. Run a **report**.

2. Click the 🖫 **(Save Changes icon)** in the top-left area of the report.

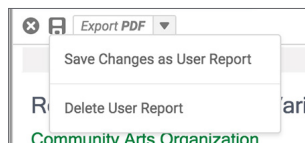3. In the menu, select **Save Changes as User Report**.
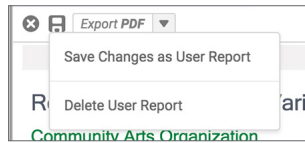
4. In the confirmation pop-up window, click **Dismiss**.

How To Restore Default Reports

Saved users reports can be removed so that the default report loads automatically.

1. Run a **report**.

2. Click the 🖫 **(Save Changes icon)** in the top-left area of the report.
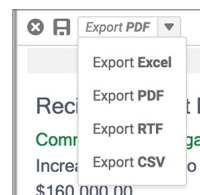
3. In the menu, select **Delete User Report**.

4. In the confirmation pop-up window, click **Dismiss**.

How To Export Reports

Reports can be exported to Excel, PDF, RTF (Rich Text Format), or CSV.

1. Run a **report**.

2. In the top-left area of the report, select an **export type** from the dropdown.

Depending on the export type, the export may open in a new tab or download automatically.

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Federal

Federal reports provides AmpliFund data that can be used to complete standard Federal reports that may be required for your grants or awards.

SF-425 Template Report

The Pre-Award Status Report provides AmpliFund data for relevant fields on the Federal Financial Report PDF form. Current versions of the SF-425 - Federal Financial Report and SF-425A - Federal Financial Report Attachment can be found under *Knowledge Center>Tools and Forms*. Because our clients may use AmpliFund to capture grant data in a variety of ways, this report can be modified as needed with Custom Reporting.

Icons

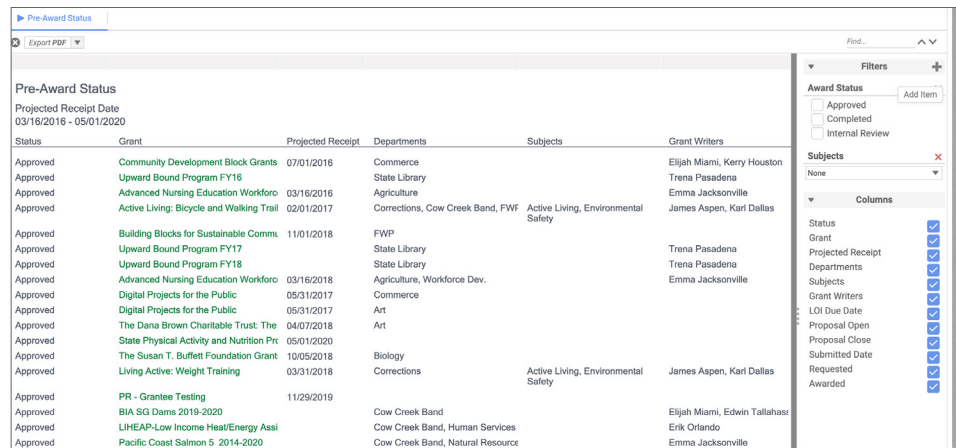|	
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Pre-Award

Pre-Award reports provides information on grants that have not yet been awarded to your organization. These reports are only available to Lifecycle and Grant Seeker clients. These reports can be accessed by Organizational Admin, Department Admin and Users with linked departments, and Additional Staff.

Pre-Award Status Report

The Pre-Award Status Report provides a list of all pre-award grants by status and projected receipt date.

The Pre-Award Status Report shows the overall range of projected receipt dates displayed. The *Status, Grant, Projected Receipt, Departments, Subjects, Grant Writers, LOI Due Date, Proposal Open, Proposal Close, Submitted, Requested* and *Awarded* columns are shown by default.
The report filters by Award Status and Subjects; Projected Receipt Date, Departments, and LOI Due Date filters are also available.

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❗ Note

For budget dates, the endpoint will show the last day of the allocation for the month, but the entire month will be included in the filter.

Post-Award

Post-Award reports provides information on grants that have been awarded to your organization. These reports are only available to Lifecycle and Grant Seeker clients. These reports can be accessed by Organizational Admin, Project Admin and Users, Department Admin and Department Users with linked departments, Grant Managers, and Additional Staff.

Grant Budget Variance Report

The Grant Budget Variance Report provides a grant's variance between the planned grant budget and submitted expenses. The report can be run directly from a grant post-award budget.

The Grant Budget Variance Report shows the grant name, grantor, grant start and end dates, and total awarded amount. The *Line Item, Responsible Individual, Budgeted Grant Funded, Budgeted Cash Match, Budgeted In-Kind Match, Budgeted Other Funding, Budgeted Total, Actual Grant Funded, Actual Cash Match Actual In-Kind Match, Actual Other Funding, Actual Total, Remaining Grant Funded, Remaining Cash Match, Remaining In-Kind Match, Remaining Other Funding, Budget Variance, Actual Spend Down* and *Expected Spend Down* columns are shown by default. The report filters by Grant, Grant Year, and Budget Date Range; the Expense Status filter is also available.

Additionally, users can click on a line item name to view the line item's Line Item Detail Report.

Grant Performance Plan Detail Report

The Grant Performance Plan Detail Report displays a list of all goals and achievements associated with a grant.

The Grant Performance Plan Detail Report shows the grant name, awarded amount, and achievements by goal type. All achievements include name, responsible individual, achievement date, attachments, completion. Milestone achievements include due date and date completed. Narrative achievements include question and answer. Numeric and reimbursement achievements include number to be achieved, number achieved, and variance. Percent achieved and percentage change achievements include percent desired, percent achieved, and variance.

Grant Performance Plan Summary Report

The Grant Performance Plan Summary Report displays a summary of grant goals and achievements.

The Grant Performance Plan Summary Report shows the grant name, awarded amount, and goals by type. All goals include name, responsible individual, achievement date, and completion. Milestone goals include due date and date of last completed achievement. Narrative goals include question and number of answers. Numeric and reimbursement goals include number to be achieved, total number achieved, and variance. Percent achieved and percentage change goals include percent desired, percent achieved to date, and variance.

Grant Expense Detail Report

The Grant Expense Detail Report displays a list of all expenses associated with a grant.

The Grant Expense Detail Report shows the grant name, grantor, grant start and end dates, and total of expenses shown. The *Expense Date, Expense Status, Description, Line Item, Category, Payee*, and *Amount* columns are shown by default. The following columns are also available: *Origin, GL Accounts, Project, Total Budgeted, Responsible Individual, Created By, Created Date, Grant Funded, Cash Match, In-Kind Match, Other Funding* and *Grant Record ID*. The report filters by Grant, Category, Line Item, and Date Range; the Expense Status filter is also available.

Post-Award Status Report

The Post-Award Status Report provides an overview of the entire grant portfolio including award risk, status, and key dates.

The Post-Award Status Report shows the overall range of awarded dates displayed. The *Status, Risk, Grant, Grantor, Departments, Subjects, Grant Manager, Awarded Date, Start Date, End Date, Close Out Date, Grant-Funded Amount, Match Requirement, Expenses to Date,* and *Remaining Available Budget* columns are shown by default. The report filters by Award Status, Risk, Departments, and Subjects; Awarded Date, Grantor, Close Out Date, and End Date filters are also available.

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Project

Project reports are available for Grant Seeker and Lifecycle clients. These reports provide information into projects. These reports can be accessed by Organizational Admin, Project Admin and Users, and Project Managers.

Project Budget Report

The Project Budget Report displays budgeted and actual amounts for project line items and the grant line items related to the project.

The Project Budget Report shows the project name, project start and end dates, total budgeted and total actual amount. The *Project Line Item, Responsible Individual, Start Date, End Date, Budgeted Amount*, and *Actual Amount* columns are shown by default. The report filters by Project and Grant.
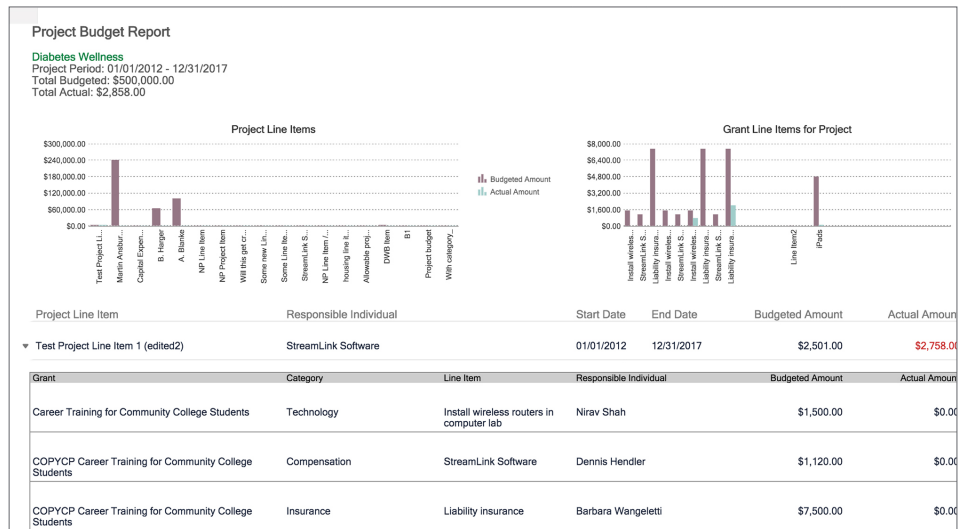
AmpliFund

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Time & Effort

For clients with Time & Effort Certification

Time & Effort reports are available for Grant Seeker and Lifecycle clients with Time & Effort Certification. These reports provide information into grant-funded and unfunded time for employees. These reports can be accessed by Organizational Admin, Certifiers, Supervisors, and Department Admin.

Time and Effort Certification Report

The Time and Effort Certification Report provides all time and effort certification documents by time period or by employee.

Users will be prompted to select employees and time period before the report is run. The Time and Effort Certification Report shows the organization name, staff name, staff title, period of time, fiscal year, and total hours. The *Grant Name, Hours,* and *Percent* columns are shown by default. The report filters by Funding Sources, i.e. grants or other.

Fund and Opportunity

Fund and Opportunity reports are available for Grant Maker and Lifecycle clients. These reports provide insight into funds, awards, and opportunities. These reports can be accessed by Organizational Admin, Fund Admin and Users, Department Admin and Users with linked departments, and Opportunity Managers.

Opportunity Funding Report

The Opportunity Funding Report displays a list of all awards funded by a selected funding opportunity. This report does not include competitive sub-award opportunities.

The Opportunity Funding Report shows the opportunity name, submission close date, and total awarded amount. The *Recipient Organization, Award Name, Awarded Date, Start Date, Awarded Amount, Cash Match, In-Kind Match, Other Funding, Total Award, Total Actual*, and *Total Remaining* columns are shown by default. The report filters by Opportunity; Category and Assistance Listing Number filters are also available.

Sub-Award Funding Report

The Sub-Award Funding Report displays a list of all sub-awards funded by a selected grant.

The Sub-Award Funding Report shows the grant name, grant start and end dates, and total awarded amount. The *Sub-Recipient Organization, Sub-Award Name, Awarded Date, Start Date, Awarded Amount, Match Requirement, Total Budget, Expenses to Date*, and *Remaining Available Budget* columns are shown by default. The report filters by Grantor and Grant; the Department filter is also available.

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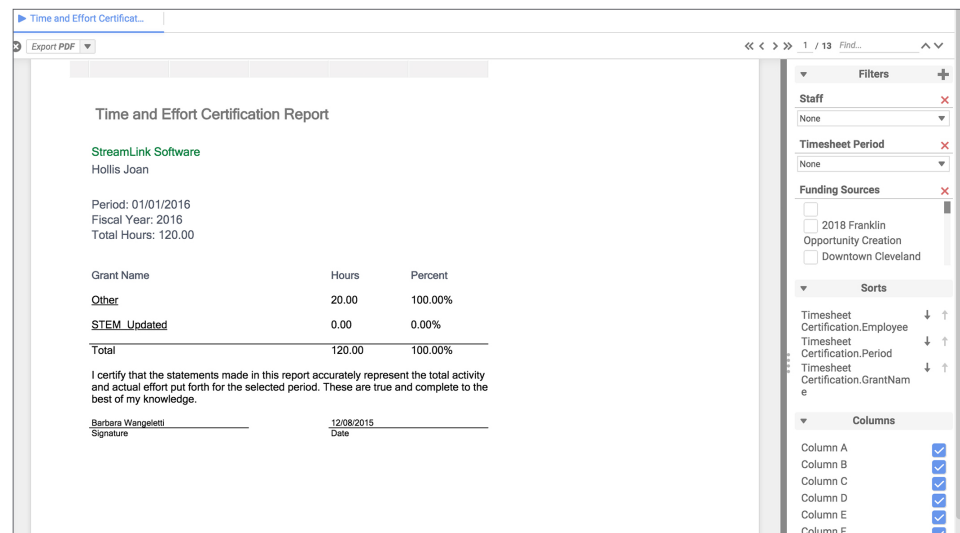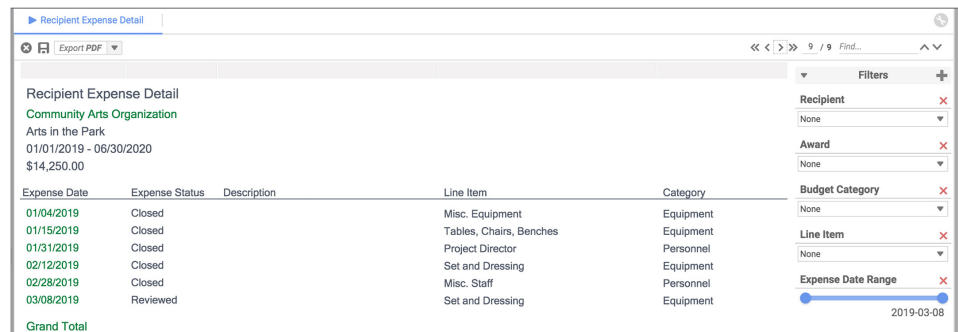
Recipient

Recipient reports are available for Grant Maker and Lifecycle clients. These reports provide insight into awards and sub-awards. Recipient (award) reports are available to Grantor and Lifecycle clients; sub-recipient (sub-award) reports are available to Grantee and Lifecycle clients. These reports can be accessed by Organizational Admin, Fund Admin and Users, Department Admin and Users with linked departments, Opportunity Managers, and Funder Grant Managers.

Recipient Expense Detail Report

The Recipient Expense Detail Report displays a list of all expenses associated with a recipient and award.

The Recipient Expense Detail Report shows the recipient name, award name, award start and end dates, and total of expenses shown. The *Expense Date, Status, Description, Line Item, Category, Payee*, and *Amount* columns are shown by default. The following columns are also available: *Origin, Total Budgeted, Responsible Individual, Created By, Created Date, Grant Funded, Cash Match, In-Kind Match, Other Funding, Recipient,* and *Grant Record ID*. The report filters by Recipient, Award, Budget Category, Line Item, and Expense Date Range; the Expense Status filter is also available.

Recipient Grant Budget Variance Report

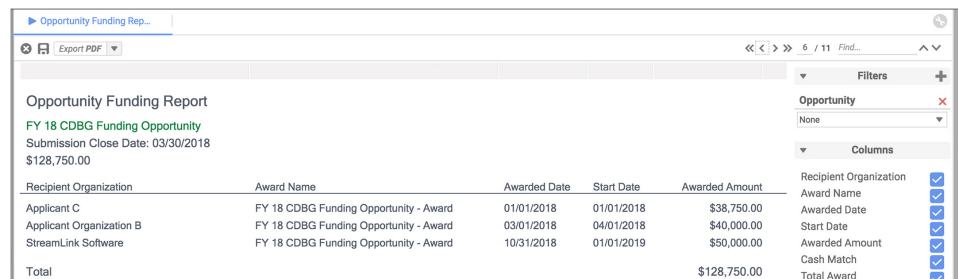The Recipient Grant Budget Variance Report provides an award's variance between the planned award budget and submitted expenses. This report is used to compare planned budget and actual expenses over the life of the award, and to monitor spending rates for compliance.

The Recipient Grant Budget Variance Report shows the recipient name, award name, total awarded amount, and award start and end dates. The *Line Item, Responsible Individual, Budgeted Grant Funded, Budgeted Cash Match, Budgeted In-Kind Match, Budgeted Other Funding, Budgeted Total, Actual Grant Funded, Actual Cash Match, Actual In-Kind Match, Actual Other Funding, Actual Total, Remaining Grant Funded, Remaining Cash Match, Remaining In-Kind Match, Remaining Other Funding, Budget*

Variance, Actual Spend Down and *Expected Spend Down* columns are shown by default. The report filters by Recipient, Award, Grant Year, Budget Date Range, and Expense Status.

Recipient Performance Plan Detail Report

The Recipient Performance Plan Detail Report displays a list of all goals and achievements associated with a recipient and award.

The Recipient Performance Plan Detail Report shows the recipient name, award name, awarded amount, and achievements by goal type. All achievements include name, responsible individual, achievement date, attachments, completion. Milestone achievements include due date and date completed. Narrative achievements include question and answer. Numeric and reimbursement achievements include number to be achieved, number achieved, and variance. Percent achieved and percentage change achievements include percent desired, percent achieved, and variance.

Recipient Performance Plan Summary Report

The Recipient Performance Plan Summary Report displays a summary of

award goals and achievements.

The Recipient Performance Plan Summary Report shows the recipient name, award name, awarded amount, and goals by type. All goals include name, responsible individual, achievement date, and completion. Milestone goals include due date and date of last completed achievement. Narrative goals include question and number of answers. Numeric and reimbursement goals include number to be achieved, total number achieved, and variance. Percent achieved and percentage change goals include percent desired, percent achieved to date, and variance.

Sub-Recipient Expense Detail Report

The Sub-Recipient Expense Detail Report displays a list of all expenses associated with a sub-recipient and sub-award.

The Sub-Recipient Expense Detail Report shows the sub-recipient name, sub-award name, sub-award start and end dates, and total of expenses shown. The *Expense Date, Status, Line Item, Category, Payee*, and *Amount* columns are shown by default. The *Description* column is also available. The report filters by parent Grant, Sub-Recipient, Sub-Award, budget Category, Line Item, and expense Date Range; the Expense Status filter is also available.
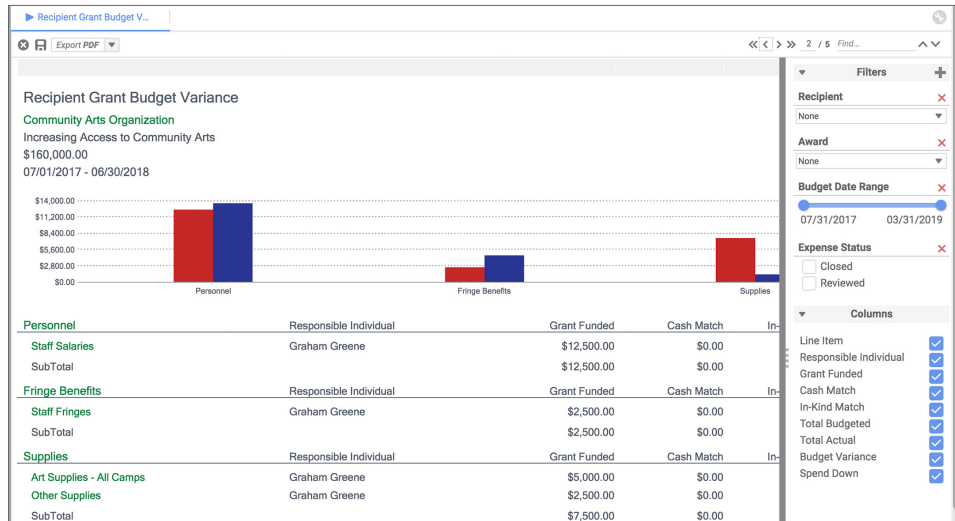

Sub-Recipient Grant Budget Variance Report

The Sub-Recipient Grant Budget Variance Report provides a sub-award's variance between the planned sub-award budget and submitted

expenses. This report is used to compare planned budget and actual expenses over the life of the sub-award, and to monitor spending rates for compliance.

The Sub-Recipient Grant Budget Variance Report shows the sub-recipient name, sub-award name, total awarded amount, and sub-award start and end dates. The *Line Item, Responsible Individual, Budgeted Grant Funded, Budgeted Cash Match, Budgeted In-Kind Match, Budgeted Other Funding, Budgeted Total, Actual Grant Funded, Actual Cash Match, Actual Other Funding, Actual Total, Budget Variance, Actual Spend Down* and Expected *Spend Down* columns are shown by default. The report filters by parent Grant, Sub-Recipient, Sub-Award, Budget Date Range, and Expense Status.

⊕ Note

For budget dates, the endpoint will show the last day of the allocation for the month, but the entire month will be included in the filter.

Icons

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💾 Save

🛡 Make Private

👥 Make Public

Custom Reports
For clients with Custom Reporting

Custom reports allows Organizational Admin, Department Admin, and Fund Admin to create ad-hoc reports using AmpliFund's data mart, including applicant data. Custom reports are available for Grant Maker, Grant Seeker, and Lifecycle clients. These reports can be accessed by all users except Researchers.

Although creating custom reports does not require coding knowledge, it does require a technical understanding of data tables and joins, as well as access to AmpliFund's data dictionary and data mart. We also recommend that users have their reporting requirements defined before attempting to create a custom report.

How To View a Custom Report

1. Open **Reports>Custom Reports**.
2. Click a **report name**.

How To Create a Custom Report

Prerequisite: Must be Organizational Admin, Department Admin, or Fund Admin

1. Open **Reports>Custom Reports**.
2. Click the **+ (Add)** icon in the *Icon Bar*.
3. Add a **report name**.
4. Select the **Custom Reports folder** for a public report (will be visible to others in your organization) or the **Custom Reports>Private folder** for a private report (only visible to you).

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5. Add a **report description** (optional). This description will appear on *Reports>Custom Report*s.

Categories

6. Open the **Categories tab**.
7. Select a **data category** to add to your report. This category corresponds to a data table in the data mart.
8. Click the **arrow button** to add the category. Additional related categories can be added to a report.

❗ Note

Once the first category has been added, only categories that are related by joins can be subsequently added.

Sorts

9.   Open the **Sorts tab**.

10.   Select a **data category** to sort. Data table columns for that category will be shown. Data columns correspond to AmpliFund fields.

> ⓘ **Note**
>
> Sorts are hierarchical, with the topmost sort applied first.

11.   Select a **column name** to sort data. Click the **arrow button** to add column.

12.   Select **sort order**.

Filters

13.   Open the **Filters tab**.

14.   Select a **data field** to filter by. This will affect which data is shown in the report by default.

15.   Click the **arrow button** to add field.

16.   Add a **data condition**. This is the criteria that must be met for data to show on the report.
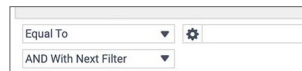
17.   Check the **Prompt For Value checkbox** to prompt the user for a filter value before report is run.

Layout

18.   Open the **Layout tab**.

19.   Select a **field** to show on the report. The field name will appear as a column, with each row being a corresponding entry.

20.   Click the **arrow button** to add field.

21. To display a formula/calculation instead of field data, click the **fx (Formula icon)** (optional).

    a. In the pop-up window, select a **function type** and click **+Add**, or edit the **formula** directly in the formula text field.

    b. Click **Okay**.

22. Select a **summary function** (optional). This indicates how the total for the column is calculated, such as a sum or count.

23. In the *Summarize By* field, select **categories** to group by (optional). Click the category name for additional formatting options.

    a. Check the **Add space before each unique item checkbox** to add a blank row before each group.

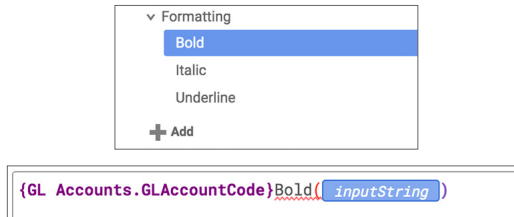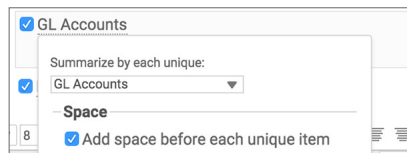   b. Check the **Include Header at the beginning checkbox** to put a field value above each group. Choose which field to use, or click the formula icon to create a formula for the text.
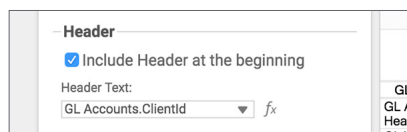
    c. Check the **Include Total at the end checkbox** to include the summary values at the end of every group.
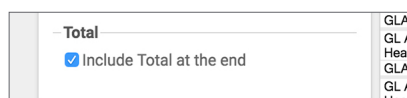
24. To add a header at the top of each page, check the **Page Header**

checkbox. This is selected by default.

25. Click **Page Header** for additional formatting options.

    a. To add report titles, check the **Include title at the top of every page checkbox**. This is selected by default.

    b. To add images, check the **Include image at the top of every page checkbox** and click **Change Image** to select a file from your computer.
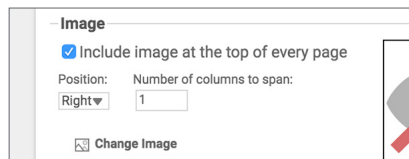
    c. If both images and titles are shown, select the **position** and **number of columns to span** for each.

26. To add a footer at the bottom of each page, check the **Page Footer checkbox**.
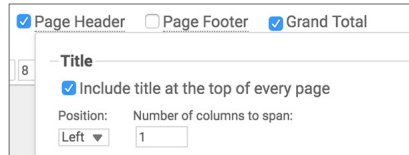
27. Click **Page Footer** for additional formatting options.

    a. To add a page numbers, check the **Include page number at the bottom of every page checkbox**.

    b. To add images, check the **Include image at the bottom of every page checkbox** and click **Change Image** to select a file from your computer.
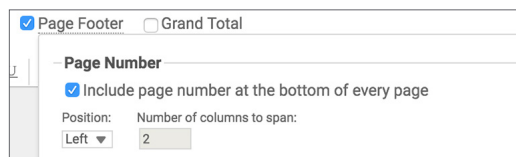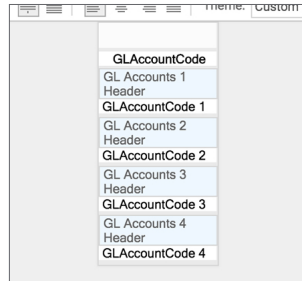
c. If both images and page numbers are shown, select the **position** and **number of columns to span** for each.

28. Check the **Grant Total checkbox** to summarize all data fields at the end of the report.

29. In the preview pane, click a **sample cell** and adjust formatting with the format toolbar as needed.

30. Click the 💾 (**Save icon**).

How To Edit a Custom Report

1. Open **Reports›Custom Reports›report name**.
2. Click the ✏ (**Edit icon**) in the *Icon Bar*.
3. Update information as necessary.
4. Click the 💾 (**Save icon**).

How To Delete a Custom Report

1. Open **Reports›Custom Reports›report name**.
2. Click the 🗑 (**Delete icon**) in the *Icon Bar*.
3. In the confirmation pop-up window, click **Delete**.

How To Make a Public Custom Report Private

By making the custom report private, other users will no longer be able to view or run the report.

1. Open **Reports›Custom Reports›report name**.
2. Click the 🛡 (**Make Private icon**) in the *Icon Bar*.
3. In the confirmation pop-up window, click **Make Private**.

How To Make a Private Custom Report Public

By making the custom report public, other users in your organization will be able to view and run the report.

1. Open **Reports>Custom Reports>report name**.

2. Click the 👥 **(Make Public icon)** in the *Icon Bar*.

3. In the confirmation pop-up window, click **Make Public**.