



## Reports User Guide

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


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# ***Reports Overview***

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

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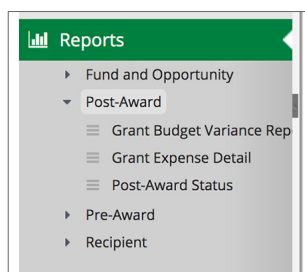
# Report Features

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.

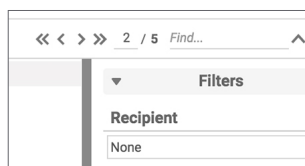
1. Open **Reports**.
2. Click the  (**Expand icon**) next to report type to expand reports list.
3. Click a **report name**.





## 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.

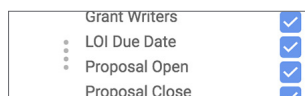
## How To Filter Report Data

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.

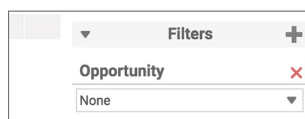
### Note

Users can also click and drag the dots to resize the filter width.

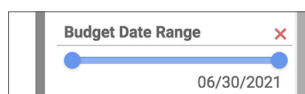
1. Run a **report**.
2. Click the **four dots** to the right of the report to show the Filter, if necessary.



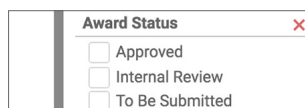
3. Click the **+** (**Add Item icon**) to add additional filters, or click the **×** (**Delete Item icon**) to remove filters. Filters are hierarchical, so the topmost filter will be applied to all data and subsequent filters will be applied to that subset of data.



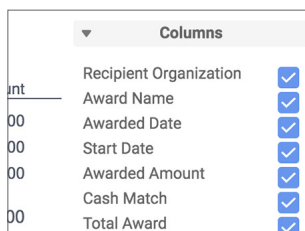
4. To filter by date, slide the **endpoints** of the Date Range slider. The dates are populated with dates from the filtered objects, such as grant or allocation dates.



5. To filter by multiple values, check the **checkboxes**. If a box is checked, data matching the selected criteria will be shown.



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



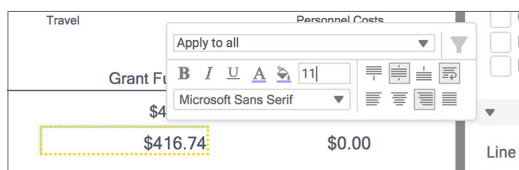
## How To Change Report Formatting

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

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



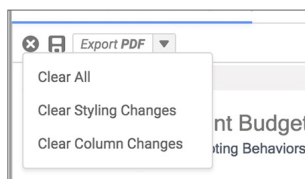
- Right click the **column or column header** to change.
- In the pop-up menu, update information as necessary.



## How To Remove Changes to Formatting or Filtering

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

- Run a **report**.
- Click the **✕ (Clear Options icon)** in the top-left area of the report.
- In the menu, select the **type of changes** to clear.




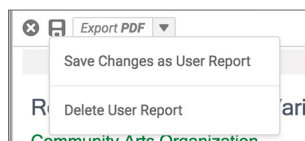
## How To Save Changes to Formatting or Filtering

### Note

Other users in the account will not be able to view or access your user report.

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**.

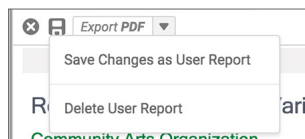


4. In the confirmation pop-up window, click **Dismiss**.

## 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**.

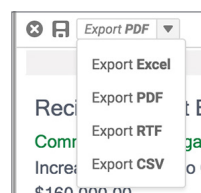


4. In the confirmation pop-up window, click **Dismiss**.

## 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.



## Icons

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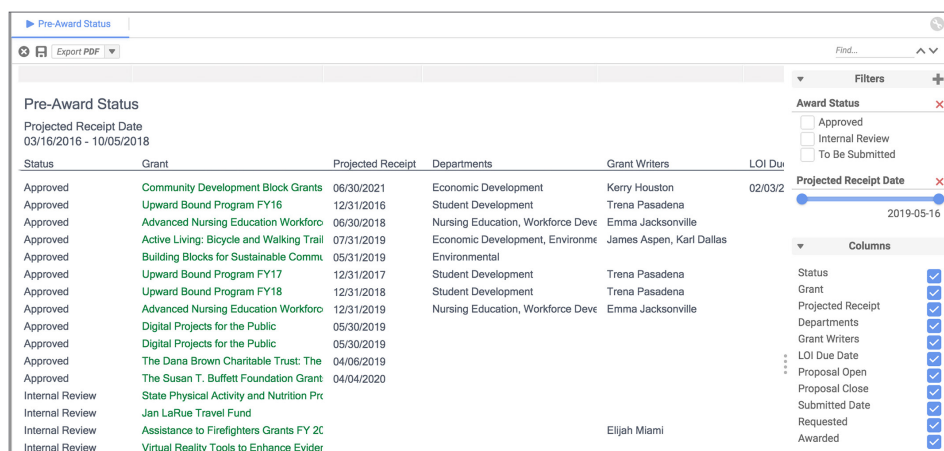
# Pre-Award

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

## 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*, *Grant Writers*, *LOI Due Date*, *Proposal Open*, *Proposal Close*, *Submitted Date*, *Requested* and *Awarded* columns are shown by default. The report filters by Award Status and Projected Receipt Date; Departments and LOI Due Date filters are also available.



The screenshot shows the 'Pre-Award Status' report interface. It includes a table with columns: Status, Grant, Projected Receipt, Departments, Grant Writers, and LOI Due. The table lists various grants with their respective statuses and dates. On the right side, there are filters for 'Award Status' (Approved, Internal Review, To Be Submitted) and 'Projected Receipt Date' (a date range from 03/16/2016 to 10/05/2018). Below the filters, there is a 'Columns' section with checkboxes for Status, Grant, Projected Receipt, Departments, Grant Writers, LOI Due Date, Proposal Open, Proposal Close, Submitted Date, Requested, and Awarded.

Status	Grant	Projected Receipt	Departments	Grant Writers	LOI Due
Approved	Community Development Block Grants	06/30/2021	Economic Development	Kerry Houston	02/03/2
Approved	Upward Bound Program FY16	12/31/2016	Student Development	Trena Pasadena	
Approved	Advanced Nursing Education Workforce	06/30/2018	Nursing Education, Workforce Deve	Emma Jacksonville	
Approved	Active Living: Bicycle and Walking Trail	07/31/2019	Economic Development, Environme	James Aspen, Karl Dallas	
Approved	Building Blocks for Sustainable Commu	05/31/2019	Environmental		
Approved	Upward Bound Program FY17	12/31/2017	Student Development	Trena Pasadena	
Approved	Upward Bound Program FY18	12/31/2018	Student Development	Trena Pasadena	
Approved	Advanced Nursing Education Workforce	12/31/2019	Nursing Education, Workforce Devt	Emma Jacksonville	
Approved	Digital Projects for the Public	05/30/2019			
Approved	The Dana Brown Charitable Trust: The	04/06/2019			
Approved	The Susan T. Buffett Foundation Grant	04/04/2020			
Internal Review	State Physical Activity and Nutrition Pr				
Internal Review	Jan LaRue Travel Fund				
Internal Review	Assistance to Firefighters Grants FY 2C			Elijah Miami	
Internal Review	Virtual Reality Tools to Enhance Evider				

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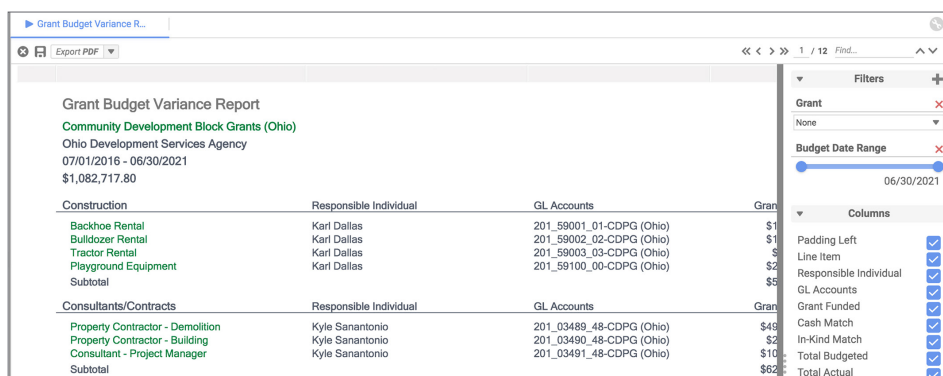
# Post-Award

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

## 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*, *GL Accounts*, *Grant Funded*, *Cash Match*, *In-Kind Match*, *Total Budgeted*, *Total Actual*, *Budget Variance*, and *Spend Down* columns are shown by default. The report filters by Grant and Date Range; the Expense Status filter is also available.



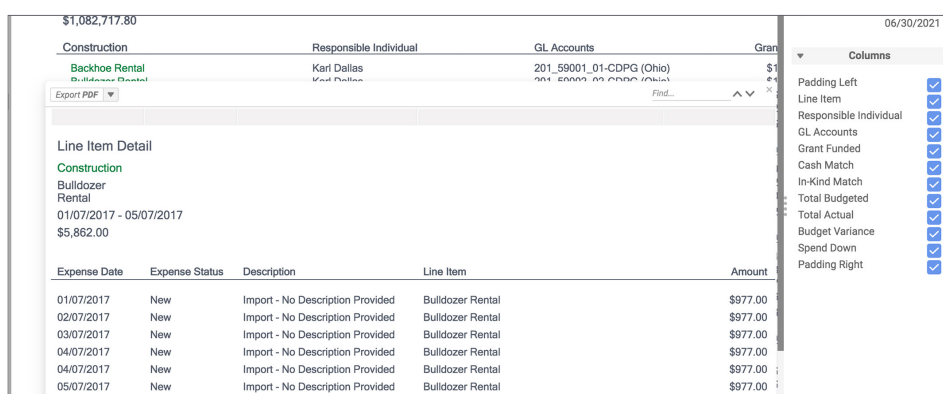
The screenshot shows the 'Grant Budget Variance Report' interface. It includes a title bar with 'Grant Budget Variance R...' and a toolbar with 'Export PDF' and navigation icons. The main content area displays the report title 'Grant Budget Variance Report' and the grant details: 'Community Development Block Grants (Ohio)', 'Ohio Development Services Agency', '07/01/2016 - 06/30/2021', and '\$1,082,717.80'. The report is organized into two sections: 'Construction' and 'Consultants/Contracts'. Each section has a table with columns for 'Responsible Individual', 'GL Accounts', and 'Grant'. The 'Construction' section lists items like 'Backhoe Rental', 'Bulldozer Rental', 'Tractor Rental', and 'Playground Equipment'. The 'Consultants/Contracts' section lists items like 'Property Contractor - Demolition', 'Property Contractor - Building', and 'Consultant - Project Manager'. A sidebar on the right contains 'Filters' (Grant, Budget Date Range) and 'Columns' (Padding Left, Line Item, Responsible Individual, GL Accounts, Grant Funded, Cash Match, In-Kind Match, Total Budgeted, Total Actual).

Construction	Responsible Individual	GL Accounts	Grant
Backhoe Rental	Karl Dallas	201_59001_01-CDPG (Ohio)	\$1
Bulldozer Rental	Karl Dallas	201_59002_02-CDPG (Ohio)	\$1
Tractor Rental	Karl Dallas	201_59003_03-CDPG (Ohio)	\$2
Playground Equipment	Karl Dallas	201_59100_00-CDPG (Ohio)	\$5
Subtotal			\$9

Consultants/Contracts	Responsible Individual	GL Accounts	Grant
Property Contractor - Demolition	Kyle Sanantonio	201_03489_48-CDPG (Ohio)	\$49
Property Contractor - Building	Kyle Sanantonio	201_03490_48-CDPG (Ohio)	\$2
Consultant - Project Manager	Kyle Sanantonio	201_03491_48-CDPG (Ohio)	\$10
Subtotal			\$62

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



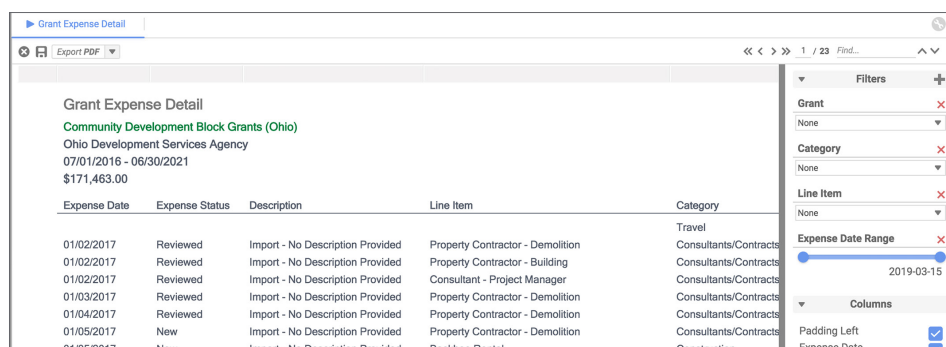
The screenshot shows the 'Line Item Detail' interface. It includes a title bar with 'Line Item Detail' and a toolbar with 'Export PDF' and navigation icons. The main content area displays the line item details: 'Construction', 'Bulldozer Rental', '01/07/2017 - 05/07/2017', and '\$5,862.00'. Below this is a table with columns for 'Expense Date', 'Expense Status', 'Description', 'Line Item', and 'Amount'. The table lists several expense entries for 'Bulldozer Rental' from 01/07/2017 to 05/07/2017, all with a status of 'New' and a description of 'Import - No Description Provided'. A sidebar on the right contains 'Columns' (Padding Left, Line Item, Responsible Individual, GL Accounts, Grant Funded, Cash Match, In-Kind Match, Total Budgeted, Total Actual, Budget Variance, Spend Down, Padding Right).

Expense Date	Expense Status	Description	Line Item	Amount
01/07/2017	New	Import - No Description Provided	Bulldozer Rental	\$977.00
02/07/2017	New	Import - No Description Provided	Bulldozer Rental	\$977.00
03/07/2017	New	Import - No Description Provided	Bulldozer Rental	\$977.00
04/07/2017	New	Import - No Description Provided	Bulldozer Rental	\$977.00
04/07/2017	New	Import - No Description Provided	Bulldozer Rental	\$977.00
05/07/2017	New	Import - No Description Provided	Bulldozer Rental	\$977.00

## 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*, *Payee*, and *Amount* columns are shown by default. The report filters by Grant, Category, Line Item, and Date Range; the Expense Status filter is also available.



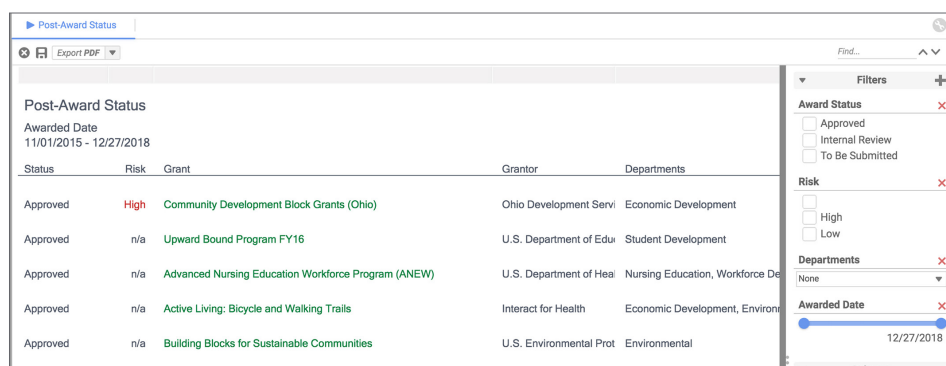
The screenshot shows the 'Grant Expense Detail' report for 'Community Development Block Grants (Ohio)'. The report displays a table of expenses with columns: Expense Date, Expense Status, Description, Line Item, and Category. The table shows several entries with dates from 01/02/2017 to 01/05/2017, all with a status of 'Reviewed' or 'New'. The total amount is \$171,463.00. The interface includes filters for Grant, Category, Line Item, and Expense Date Range, and a 'Columns' section to toggle visible columns.

Expense Date	Expense Status	Description	Line Item	Category
01/02/2017	Reviewed	Import - No Description Provided	Property Contractor - Demolition	Travel
01/02/2017	Reviewed	Import - No Description Provided	Property Contractor - Building	Consultants/Contracts
01/02/2017	Reviewed	Import - No Description Provided	Consultant - Project Manager	Consultants/Contracts
01/03/2017	Reviewed	Import - No Description Provided	Property Contractor - Demolition	Consultants/Contracts
01/04/2017	Reviewed	Import - No Description Provided	Property Contractor - Demolition	Consultants/Contracts
01/05/2017	New	Import - No Description Provided	Property Contractor - Demolition	Consultants/Contracts
01/05/2017	New	Import - No Description Provided	Backhoe Rental	Construction

## 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*, *Grant Manager*, *Awarded Date*, *Start Date*, *End Date*, *Close Out Date*, *Awarded Amount*, *Spend to Date*, and *Amount Remaining* columns are shown by default. The report filters by Award Status, Risk, Departments, and Awarded Date; Grantor, Close Out Date, and End Date filters are also available.



The screenshot shows the 'Post-Award Status' report. The report displays a table of grants with columns: Status, Risk, Grant, Grantor, and Departments. The table shows several grants with statuses of 'Approved' and risks of 'High' or 'n/a'. The interface includes filters for Award Status, Risk, Departments, and Awarded Date, and a 'Columns' section to toggle visible columns.

Status	Risk	Grant	Grantor	Departments
Approved	High	Community Development Block Grants (Ohio)	Ohio Development Servi	Economic Development
Approved	n/a	Upward Bound Program FY16	U.S. Department of Edu	Student Development
Approved	n/a	Advanced Nursing Education Workforce Program (ANEW)	U.S. Department of Hea	Nursing Education, Workforce De
Approved	n/a	Active Living: Bicycle and Walking Trails	Interact for Health	Economic Development, Environ
Approved	n/a	Building Blocks for Sustainable Communities	U.S. Environmental Prot	Environmental

## Icons

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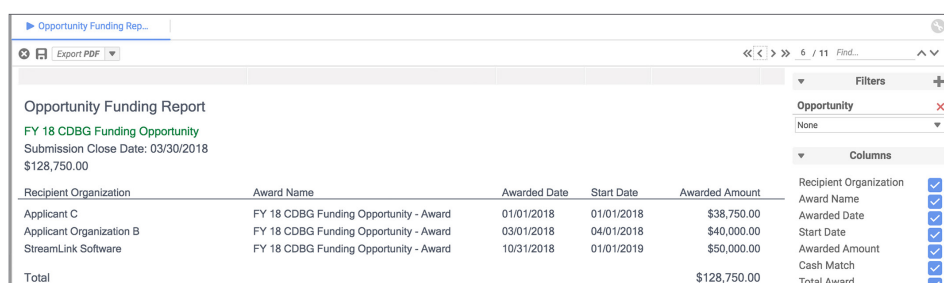
# Fund and Opportunity

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

## 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*, *Total Award*, *Total Actual*, and *Remaining* columns are shown by default. The report filters by Opportunity; Category and CFDA Number filters are also available.



The screenshot shows the 'Opportunity Funding Report' interface. It includes a header with 'Opportunity Funding Rep...' and an 'Export PDF' button. Below the header, the report title 'Opportunity Funding Report' is displayed, followed by 'FY 18 CDBG Funding Opportunity' and 'Submission Close Date: 03/30/2018' with a total of '\$128,750.00'. The main table lists awards with columns: Recipient Organization, Award Name, Awarded Date, Start Date, and Awarded Amount. The table shows three rows of awards and a total row. On the right, there are 'Filters' and 'Columns' panels. The 'Filters' panel shows 'Opportunity' set to 'None'. The 'Columns' panel shows a list of columns with checkboxes, including 'Recipient Organization', 'Award Name', 'Awarded Date', 'Start Date', 'Awarded Amount', 'Cash Match', 'Total Award', 'Total Actual', and 'Remaining'.

Recipient Organization	Award Name	Awarded Date	Start Date	Awarded Amount
Applicant C	FY 18 CDBG Funding Opportunity - Award	01/01/2018	01/01/2018	\$38,750.00
Applicant Organization B	FY 18 CDBG Funding Opportunity - Award	03/01/2018	04/01/2018	\$40,000.00
StreamLink Software	FY 18 CDBG Funding Opportunity - Award	10/31/2018	01/01/2019	\$50,000.00
Total				\$128,750.00

## 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*, *Cash Match*, *Total Award*, *Total Actual*, and *Remaining* columns are shown by default. The report filters by Grantor and Grant; the Department filter is also available.

Sub-Award Funding Report

Export PDF

Sub-Award Funding Report

Digital Projects for the Public  
05/31/2017 - 05/31/2019  
\$430,000.00

Sub-Recipient Organization	Sub-Award Name	Awarded Date	Start Date	Awarded Amount	C
Smith Technology Services	Digital Projects for the Public - Sub-Award	06/01/2017	06/01/2017	\$80,000.00	
Center for the Arts	Digital Projects for the Public	06/01/2017	06/01/2017	\$350,000.00	
Total				\$430,000.00	











Filters

Grantor  
National Foundation on the  
Grant  
Digital Projects for the Public

Columns

Recipient Organization  
Award Name  
Awarded Date  
Start Date

## Icons

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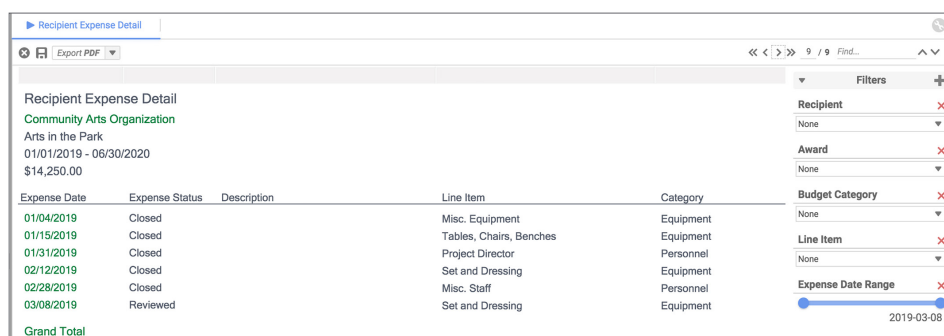
# Recipient

Recipient reports are available for Grantor 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, Opportunity Managers, Award Grant Managers, and Department Admin and Department Users with linked departments.

## 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 report filters by Recipient, Award, Budget Category, Line Item, and Expense Date Range; the Expense Status filter is also available.



The screenshot shows the 'Recipient Expense Detail' report for the 'Community Arts Organization' under the award 'Arts in the Park' for the period 01/01/2019 - 06/30/2020, with a total amount of \$14,250.00. The table lists expenses with columns for Expense Date, Expense Status, Description, Line Item, and Category. A filters panel on the right allows filtering by Recipient, Award, Budget Category, Line Item, and Expense Date Range.

Expense Date	Expense Status	Description	Line Item	Category
01/04/2019	Closed	Misc. Equipment		Equipment
01/15/2019	Closed	Tables, Chairs, Benches		Equipment
01/31/2019	Closed	Project Director		Personnel
02/12/2019	Closed	Set and Dressing		Equipment
02/28/2019	Closed	Misc. Staff		Personnel
03/08/2019	Reviewed	Set and Dressing		Equipment
<b>Grand Total</b>				

## 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*, *Grant Funded*, *Cash Match*, *In-Kind Match*, *Total Budgeted*, *Total Actual*, *Budget Variance*, and *Spend Down* columns are shown by default. The report filters by Recipient, Award, Budget Date Range, and Expense Status.



## 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 Expense D...

Export PDF

Sub-Recipient Expense Detail

Digital Projects for the Public

Center for the Arts  
Digital Projects for the Public  
06/01/2017 - 05/31/2019  
\$77,425.00

Expense Date	Status	Line Item	Category	Payee
06/30/2017	Closed	Center for Arts Personnel		
07/10/2017	New	iPads		
06/21/2017	Closed	Marketing Materials		
07/10/2017	Reviewed	Program Development		
06/22/2017	Closed	Program Development		
Grand Total				

Filters

Grant: Digital Projects for the Public

Sub-Recipient: None

Sub-Award: None

Category: None

Line Item: None

Date Range: None

## 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*, *Grant Funded*, *Cash Match*, *In-Kind Match*, *Total Budgeted*, *Total Actual*, *Budget Variance*, and *Spend Down* columns are shown by default. The report filters by parent Grant, Sub-Recipient, Sub-Award, Budget Date Range, and Expense Status.

