

RAM Reports Guidance

Research Administration Management (RAM) Reports deliver financial information via an enhanced reporting tool to offer a robust experience managing sponsored projects financials. Below is an outline of the tool and how to use it.

Key reminders navigating the tool: blue texts are hyperlinks to click into another screen, and all reports may be downloaded into Excel.

USING RAM REPORTS

1. Project Search

Project Search ¹

Search projects and awards by ID, name, department, or PI

<input type="text" value="Select Award"/> Search for awards by ID or description	<input type="text" value="Select Project ID"/> Search for projects by ID or description	<input type="text" value="Select Department"/> Search for departments by ID or description	<input type="text" value="Select PI"/> Search for principal investigators by ID or name	<input type="text" value="Status"/> Limit results based on project status	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
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Show entries

[Download](#)

Award	Project	Budget	Expense LTD	Current Balance
A22-0098-003	5125122	657,795.00	161,360.17	496,434.83

Showing 1 to 1 of 1 entries

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This is the page you will see when you initially open RAM Reports. You can use this page to search by the RAMSeS Award Number, Project ID, Department (*accessible based on department assignment*), Principal Investigator (PI), and Status.

You can download the results, and you can access award information by clicking either on the Award or Project hyperlink.

2. Award Summary

Award Summary ²

Date of Report 10/11/2022

Award	A22-0098-003	Award Dates	07/01/2022 - 06/30/2023
Award Title	North Carolina LEND	Award Purpose	Public Service (401) (PS)
Project ID	5125122 , 5125123 , 5125124 , 5125125	Department	429401 - Carolina Institute for DD
PI Name	Pretzel, Rebecca E		
Sponsor	5323 - Health Resources and Services Administra		
Sponsor Award #	5-T73-MC00030-31		

This layout is similar to the layout in RAMSeS. It will show the Award title, all project IDs associated with this award, Sponsor, PI, Award Dates, and Department. This will be at the top of every tab when you are viewing the award data. You are able to switch between the Award Summary and Project Summary views by clicking on the associated blue hyperlink.

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3. Project Summary

Project Summary 3

Date of Report 10/21/2022

<p>Project ID 5125123</p> <p>Project Title SUBACCT:TAAINEE COST FandA EXE</p> <p>Award A22-0098-003</p> <p>Award Title North Carolina LEND</p> <p>PI Name PRETZEL,REBECCA E</p> <p>Sponsor 5323 - Health Resources and Services Administra</p> <p>Sponsor Award # 5-T73-MC00030-31</p> <p>Department 429401 - Carolina Institute for DD</p>	<p>Project Status Open (O)</p> <p>Budget Dates 07/01/2022 - 06/30/2023</p> <p>Project Dates 07/01/2022 - 06/30/2023</p> <p>Project Type Federal (FED)</p> <p>F&A Rate Type On Campus - Organized Research (OR)</p> <p>F&A Base (Rate %) MTDC (0.0%)</p>
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This information is similar to the layout in RAMSeS on a **project specific** level. It will show the project title, the award number, Sponsor, PI, project and budget dates, F&A rate and base type, and Department. This will be at the top of every tab when you are viewing the project specific data. If there are multiple project IDs, this information will reflect the project ID that you have selected.

4. Tab Views

The tab views and display are the same for both Award and Project Summary pages, except for the Accounts Receivable (AR) tab as billing is done at the award level. However, when the Award Number is selected, it will show a **rollup of the data for all project IDs** under that award. When a specific Project ID is selected, it will **show data specific to that project**. All information are posted transactions from ConnectCarolina and is a day behind those transactions.

a. Financial Info

Financial
a
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Financial Info

FY 2023 ▼ Period 4-October ▼ Apply

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Category	Budget	Expense MTD	Expense FYTD	Expense LTD	Current Balance	Pre-Enc / Encumbrance	Payroll Projection	Projected Balance
Salaries	455,213.00	6,192.50	95,935.74	95,935.74	359,277.26	0.00	296,925.78	62,351.48
Salaries	344,294.00	4,237.44	69,298.68	69,298.68	274,995.32	0.00	221,898.99	53,096.33
Fringe Benefits	110,919.00	1,955.06	26,637.06	26,637.06	84,281.94	0.00	75,026.79	9,255.15
Other	300,519.00	381.07	102,839.16	102,839.16	197,679.84	0.00	22,176.00	175,503.84

The **Financial** tab contains summarized information about a project’s salaries, direct and indirect costs, and other expenditures. You can click the category name to see transactions and information for those items.

Once you click the blue hyperlink for the category you wish to view, you will see all transactions posted in ConnectCarolina for that budget category.

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Transactions

Award [A22-0098-003](#) Employee [700597327](#) Account [511120](#) Fund [25236](#) Source [49000](#) Department [429401](#)

Apply Show Cost Codes Download

Show 10 ▼ entries Search:

Trans Type	FY	Acct Prd	Fund	Source	Dept ID	Account	Project	Program	Description	Amount	Acct Dt
HR_PAYROLL	2023	3	25236	49000	429401	511120	5125122	MC202		205.98	09/30/2022
HR_PAYROLL	2023	3	25236	49000	429401	511120	5125122	MC202		(12.36)	09/01/2022

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You can then click on the blue hyperlinked amount to see the details for that specific entry that was posted in ConnectCarolina.

Transaction Detail Date of Report 10/21/2022

TX Key PAYROLL_196309970

Amount	Pay Date	Employee Name	Jrnl ID	Jrnl Date	Fund	Source	Account	Dept ID	Project	Program	CC1	CC2	CC3
205.98	09/30/2022		PAY0886379	09/30/2022	25236	49000	511120	429401	5125122	MC202			

PAY0886379

Business Unit	Journal Date	Source	System Source	Ledger	Budget Check Date	Seq Num
UNCCCH	09/30/2022	PAY	GHR	ACTUALS	09/28/2022	6
Amount	Employee Name	PID	PAAT ID	Journal Line	Description	
205.98				69110	HR Payroll Journal Template	

Payroll

b. AR (Accounts Receivable)

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Invoices [Download](#)

All
 Open
 Closed

Show 10 entries Search:

Invoice	Entry Type	Status	Balance	Orig Amount	Acct Date	Due Date	Last Activity	Sponsor
LOC0340831	Invoice (IN)	Open (O)	6,541.80	6,541.80	10/07/2022	10/07/2022	10/07/2022	Department of Health and Human Services
LOC0339803	Invoice (IN)	Closed (C)	0.00	735.73	10/04/2022	10/04/2022	10/05/2022	Department of Health and Human Services

The **Accounts Receivable (AR)** tab contains a listing of invoices generated in ConnectCarolina associated with an award. Clicking on an invoice number will allow you to review the details for that invoice. All other invoices and financial reports can be viewed in [RAMSeS' Billing Tab](#) which can be directly accessed by clicking on the Billing Attachments link.

AR Invoice Date of Report 10/21/2022

Invoice	LOC0342787	Billing Attachments		
Award	A22-0098-003	Acct Date	10/18/2022	Sponsor
Balance	1,063.28	Due Date	10/18/2022	Sponsor Award #
Orig Amt	1,063.28	LOC ID	6390P	Bill Spec
Status	Open (O)	LOC Doc ID	21T73MC00030	Bill Auth
				Department of Health and Human Services (5285)
				5-T73-MC00030-31
				Bridget Foust
				David Morgan

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Activities [Download](#)

Show 10 entries

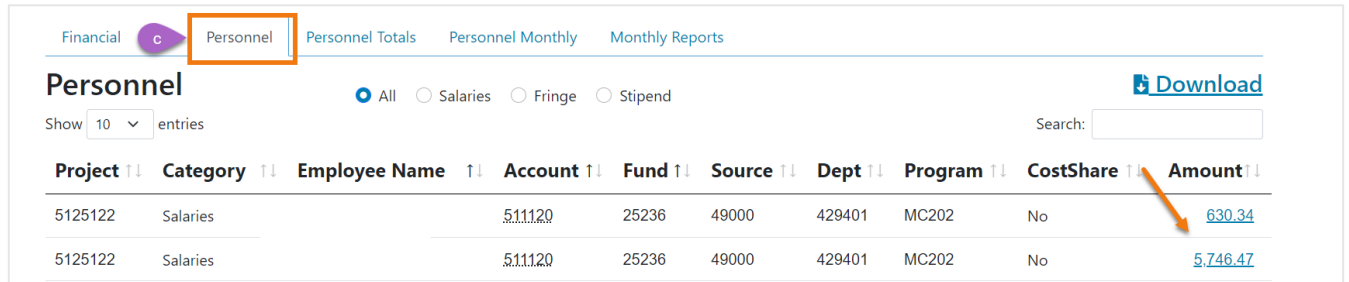
Accounting Date	Entry Amount	Post Date	Payment ID	Entry Type	Deposit BU	Deposit ID	Group BU	Group ID
10/18/2022	1,063.28	10/18/2022		Invoice (IN)			CHOSR	93102

Showing 1 to 1 of 1 entries Previous 1 Next

If you click on the hyperlinked invoice ID, it will open the details of that invoice.

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c. Personnel



Project	Category	Employee Name	Account	Fund	Source	Dept	Program	CostShare	Amount
5125122	Salaries		5.111.120	25236	49000	429401	MC202	No	630.34
5125122	Salaries		5.111.120	25236	49000	429401	MC202	No	5,746.47

The **Personnel** tab contains a listing of employees associated with a project, along with the amount paid to each employee. Clicking on the amount will give a breakdown of the amount paid to the employee for each pay period.

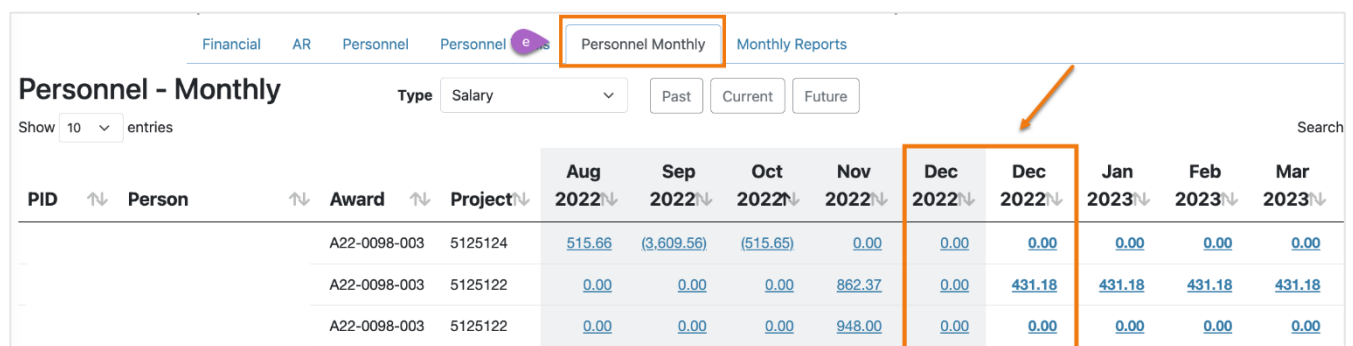
d. Personnel Totals



PID	Person	Paid Salary	Paid Fringe	Annual Salary	Distribution Percent	Projected Salary	Projected Fringe	End Date
		630.34	50.82	2,471.75	4.858	1,853.82	527.22	06/30/2023
		5,746.47	1,849.34	22,985.81	13.39	17,239.32	4,737.74	06/30/2023
		436.74	120.96	1,746.44	1.209	1,309.86	372.51	06/30/2023
		921.79	409.44	3,687.18	5.049	2,765.43	786.51	06/30/2023

The **Personnel Totals** tab allows you to view each project employee's Paid Salary and Fringe that has posted, and Projected Salary and Fringe based on ePAR amounts. Clicking on each Amount next to an employee's name will show you a breakdown of the amount paid to that employee.

e. Personnel Monthly



PID	Person	Award	Project	Aug	Sep	Oct	Nov	Dec	Dec	Jan	Feb	Mar
				2022	2022	2022	2022	2022	2022	2023	2023	2023
		A22-0098-003	5125124	515.66	(3,609.56)	(515.65)	0.00	0.00	0.00	0.00	0.00	0.00
		A22-0098-003	5125122	0.00	0.00	0.00	862.37	0.00	431.18	431.18	431.18	431.18
		A22-0098-003	5125122	0.00	0.00	0.00	948.00	0.00	0.00	0.00	0.00	0.00

The **Personnel Monthly** tab allows you to view a month-to-month breakdown of each employee's total wages. Monthly amounts already paid and posted are shaded in grey. Projected monthly totals are displayed in white and are based on what is currently in ConnectCarolina from completed ePARs and their corresponding amounts. The current month is split between actuals and projections and will display in 2 columns.

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f. Monthly Reports

Award	Fiscal Year	Period	Summary	Detail
A22-0098-003	2023	2-August	PDF CSV	PDF CSV
A22-0098-003	2023	1-July	PDF CSV	PDF CSV
A22-0098-003	2022	12-June	PDF CSV	n/a

The **Monthly Reports** tab allows you to download Summary and Detailed monthly expense reports for a project. Reports can be downloaded as PDF files, or as CSV files for use in Excel.

USING MY RESOURCES

Users can access RAM Reports personalized reporting feature called "**My Resources**" to display a summary of award information based on their pre-mapped [roles for RAMSeS](#).

1. My Projects

Award / Project	Sponsor / Description	Project PI	Status	Project Begin	Project End	Total / Budget	Expense LTD	Current Balance
A09-0614-001	NIH National Institute of Child Health a / Gene-Environment Interactions and Weight Gain					2,920,944.00		
5051423	Gene-Environment Interactions		Reporting	09/30/2008	06/30/2014	2,602,910.86	2,614,369.95	(11,459.09)
5051424	SUBCON:BOSTON UNIV		Reporting	09/30/2008	06/30/2012	177,774.00	177,774.00	0.00
5051425	SUBCON:UNIV COLORADO		Reporting	09/30/2008	06/30/2010	140,259.14	140,259.14	0.00
A19-1063-002	NIH National Heart, Lung, and Blood Inst / Leveraging multi-omics approaches to examine metabolic c					7,501,151.71		
5116705	Leveraging multi-omics approac		Open	04/01/2020	03/31/2023	6,433,333.71	2,397,912.06	4,035,421.65
5116706	SUBCON:UNIVERSITY OF ALABAMA A		Open	04/01/2020	03/31/2023	109,014.00	48,768.49	60,245.51
5116707	SUBCON:KAISER PERMANENTE		Open	04/01/2020	03/31/2023	137,711.00	49,387.92	88,323.08

The **Projects** tab provides an overview of all current projects for your department. Clicking on the award number will show the overall **Award Summary** page for all project IDs rolled under the award. To access information about an individual project, click on that project's ID number. You can also see the Status of each Award and Project ID in ConnecCarolina. Checking the **Direct Only** box will allow you to view Direct Costs associated with each project. Checking the **Show Closed** box will allow you to view all projects in closed or reporting status. This information can be downloaded as a CSV file for use in Excel.

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2. My Personnel Totals

My Personnel - Totals

Personnel on Awards and Projects associated with me

Show 10 entries

Projects **Personnel Totals** Personnel Monthly

Current Only

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PID	Person	Award	Project	Paid Salary	Paid Fringe	Annual Salary	Distribution Percent	Projected Salary	Projected Fringe	End Date
		A19-1063-002	5116705	64,429.41	17,124.20	26,084.16	16	8,694.72	2,371.14	03/31/2023
		A19-1063-002	5116705	35,268.59	14,819.04	15,683.55	15	5,730.50	2,410.33	03/31/2023
		A19-1063-002	5116705	102,294.33	22,440.47	32,591.44	12.693	19,130.00	4,410.50	03/31/2023
		A19-1063-002	5116705	45,549.32	13,875.59	28,872.90	30	9,624.32	2,737.20	03/31/2023
		A19-1063-002	5116705	85,288.10	30,315.93	20,478.22	12.99	6,826.08	1,838.06	03/31/2023
		A19-1063-002	5116705	44,525.00	1,471.50	26,352.00	100	8,784.00	1,896.48	03/31/2023

The **Personnel Totals** tab gives an overview of the salary for employees on all projects. Clicking on a **Paid Salary** total provides a monthly breakdown of the salary that has been paid to an individual. Checking the **Current Only** box allows you to view salary information for current employees only. The **Distribution Percent** also identifies the percent of that individuals total wages paid from the corresponding award. This information can be downloaded to a CSV file for use in Excel.

3. My Personnel Monthly

My Personnel - Monthly

Personnel on Awards and Projects associated with me

Type: **Salary** (dropdown) Past Current Future

Show

- Salary
- Fringe
- Salary - Cost Share
- Fringe - Cost Share

Projects Personnel Totals **Personnel Monthly**

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PID	Person	Award	Project	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023
A09-0614-001	5051423			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
A19-1063-002	5116705			2,100.17	2,247.19	2,173.68	2,173.68	2,173.68	0.00	2,173.68	2,173.68	2,173.68	2,173.68	0.00
A11-0169-001	5030757			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

The **Personnel Monthly** tab shows all personnel totals by month. The dropdown box at the top left allows you to view and select by Salary, Fringe, Salary Cost Share, and Fringe Cost Share. You can view Past, Current, and Projected totals as well. This information can be downloaded to a CSV file for use in Excel.