# 2011 Duke Research Symposium

May 11, 2011

# 1) Duke@Work Portal

IF YOU DO NOT HAVE ACCESS TO THE GRANTS MANAGEMENT TAB, CONTACT YOUR DEPARTMENTS SAP USER ADMINISTRATOR AND ASK FOR: BUSINESS MANAGER LEVEL WEB REPORTING ACCESS.

Crosswalk between MyResearch and Grants Management views for financial reports

## **MyResearch view**

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### MyResearch Reports

- 1. Project Summary Report
- 2. Financial Summary Report
- 3. Personnel Report
- 4. Sponsor Required Final Financial Report Status

#### **Grants Management view**



<u>Keys to matching what your PI sees</u>: Enter their correct Unique ID and **run the report through the current open period**. What the PI sees is updated through last night, NOT through the last closed period.

## Accounting View of Payroll Report

Available to be run by anyone with the Grants Management tab on their Duke@Work <u>AND</u> is assigned as Grant Administrator on Projects/WBSEs

None of the other reports on the Grants Management tab are limited by assignment to specific WBSE's. They are typically executed with a specific PI's Unique ID

Make sure you enter the Fiscal Month as a 3 digit months (001, not 01) to make sure it executes correctly.

<u>New:</u> The payroll report will pick up cost center assignments made as departments start to roll out Buy@Duke and Grant Projections

A new header has been added at top of report to display the Period/Fiscal Year selection criteria

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To enter a range of periods, click on the selection drop down in the Period/Fiscal Year field



Enter From/To values and click Ok

### Grants Management Tab > Maintenance of Grant Administrators

Available to anyone set up as Department Administrator (this role is maintained by the Office of Sponsored Programs)

New: A new field has been added to this tool: Alternate Approver. This field will be maintained the same as Grant Administrator is, new columns are being added to the tool within the next week or two. The Alternate Approver is used only for Buy@Duke, it is not used for anything else (e.g. no payroll reporting)

Export functionality is also being added, it will be available within the next week or two.

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To export list to excel, click on "Export" button at top left of screen, then click on "Export to Microsoft Excel"

To sort on any of the columns, click on "Settings" button at top right of screen, this opens up Settings section at top of screen.

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Click on "Sort" tab, then select from the list on the left, the Column you want to sort the list by, click "Add" button to move it to the right.

#### Click "Apply" to sort the list.

To close the settings box, click "Cancel" button.

You can also click on the "Filters" tab to apply filters to the data, perhaps by filtering on a specific Grant Admin or PI.

# **Finance Tab**

A new tab was added recently to the Duke@Work portal, the Finance tab. This is a link to reports similar to reports currently run in R/3, but which are now available on the web. Anyone with a Financial security role in R/3 should have the tab available automatically, you should not have to request this.

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Standard Reports available in each section: Monthly Financials, Endowments, SOM and in the future, PAMC

### e.g. Monthly Financials



You will see typical reports you might run directly in R/3: ZF109, ZF107, etc.

Clicking on ZF109, selection criteria will look as follows:

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NOTE: Duke Cost Object Hierarchy: This is where you can enter a BFR, but you need to ALWAYS preceed the BFR number with the letters: **OU** 

Reports can be printed or exported to Excel.

#### Master Data Tab > Departmental Administrator Report

New report which shows who is assigned as Departmental Administrator for a BFR. This is the role that is able to assign Grant Administrator's to Projects/WBSEs



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Click on Execute Button



### Master Data tab > JV Approvers Report

This report identifies, by BFR, those individuals have the JV DEPT/SCHL role for JV Workflow. This is the role that determines who can provide departmental approval in JV workflow for transactions that meet University approval rules

- these are different by Management Center. These are also the individuals that will be able to assign Grant Administrators to Cost Centers when Buy@Duke is rolled out to each department.

This report is executed the same way as the Departmental Administrator Report

# 2) Project Reporting in R/3

# New fields in Project Master – Transaction CJ03

- Alternative Approver
- Contact Information for OSP
- Budget Periods

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# 3) Using Dynamic Selection to run reports for Multi-Code Projects

I. Running Reports in R/3 to find all codes within the same award – This same functionality allows you to run reports on codes that you are Grant Administrator, or any other master data selection criteria you want to use.

NOTE: To NOT include Closed codes in your report, click on the STATUS icon and Enter "CURRENT" in the Project Definitions box, click on Green check mark to Continue

Example, Project Inception To-Date Report – Transaction ZFR1E

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Enter desired selection criteria - in this case, put in the PARENT fund code.

Enter Project Ranges of 2000000 - 3999999 (use 📑 Multiple Selection to add additional ranges)

# Click on 🕒 Execute icon

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You can look through each of the projects individually, by clicking on the project number on the left of the screen.

Example: Master Data List for Projects – Transaction ZFR1AM – Do you maintain a manual list of fund codes that you're responsible for, either as Grant Admin or for a Multi-code Project? Try using the Master Data list in R/3.

Click on Dynamic Selection Icon

	Project Info System: Project Def	initions Initial Screen Status	
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Enter desired selection criteria – you can run by BFR, PI, Grant Admin ID, Parent or for combinations of criteria.

Enter Project Ranges of 2000000 - 39999999 (use Multiple Selection to add additional ranges)

Click on Status icon and Enter "CURRENT" in the Project Definitions box, click on Green check mark to Continue

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To add additional columns, follow menu path: View > Choose Fields



Scroll through the fields listed on the right side of the pop-up box, any of these can be displayed on your report. To display an item, select the item by clicking on the button to the left of the Field name and then click on the Choose button pointing to the left to move it the Selected Fields box. You can select multiple fields to add. Recommended fields: Grant Administrator, BFR, Fund Code Long Description.

Click on the Green check mark icon to continue and add the new field(s)

(Suggestion: Change the Length of the Status field to 10 - defaults to 40 - so as not to take up more room than needed.)

<u>Uses for this report include:</u> Obtaining a list of all the codes assigned to a specific PI or Grant Administrator, looking for codes that are still open where the finish date is more than 90 days in the past.

This report can be printed or downloaded to Excel

- 4) Upcoming Projects for Sponsored Research
- Accounts Receivable OSP & DCRI go-live September 1<sup>st</sup>, 2011
- Projections Pilots July 1, 2011
- Document Imaging Target go-live July 2012
- 5) <u>Online instructions are available at: R3.DUKE.EDU</u> Click on the SAP Reference Material link on the left and choose Step by Step instructions or any of othe other links
- 6) Advanced Grant Administrator Reporting class coming in July, 2011