

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

The screenshot shows the Duke@Work MyResearch interface. In the top navigation bar, 'MyResearch' is selected. Below it, the 'mpProjects' section displays a grid of project details including Cost Object ID, Start date, Finish date, and Sponsor. To the right of the grid is a 'Alerts' section showing a single record for 'Protocol' with ID 'Pro00019314' and description 'Oncogenic Gene Regulatory Networks'. Below the grid are several reporting links:

- Submit New: 1. Project Summary Report, 2. Financial Summary Report, 3. Personal Report, 4. Submit Safety Report (eIRB)
- Manage Active Projects: 1. Project Summary Report, 2. Financial Summary Report, 3. Personal Report, 4. Submit Safety Report (eIRB)
- Portfolios: 1. Portfolio, 2. Selection, 3. Allocation, 4. Investment Health
- Links and Resources: ARRA Disclosure Forms, Public Central ID, Toolkit, Export Controls, Faculty Handbook
- Announcements: Duke Research, DTMF Announcements, NSF Announcements, NIH Announcements, Help/Feedback
- Disclosures and Agreements: Patients and Filings, Publication Agreements, Material Transfer Agreements, Confidentiality Agreements, Research Agreements
- Funding Opportunities and Grant Applications: Funding Opportunities, NIH eCommons, Grants Duke, Grants Gov, NCI, Nsf

MyResearch Reports

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

Grants Management view

The screenshot shows the Duke@Work Grants Management view. The top navigation bar includes 'Grants Management' and 'Faculty Reports / ECR' tabs. Below the navigation is a grid of report icons with descriptions:

- MyResearch Financial Summary: Shows a financial summary of all cost objects belonging to a selected PI.
- MyResearch Personnel Report: Lists all employees currently funded by cost objects belonging to a selected PI along with their percent of effort.
- MyResearch Summary Awards: Detail view of budget vs. actual for all award-based research codes belonging to a selected PI.
- MyResearch Sponsor Required Final Financial Report Status Report: Lists the status of all sponsor required final financial reports for projects belonging to the selected PI.
- MyResearch Summary Fund Balance Statement: Detail view of the fund balance of discretionary and other 3xx/xxx codes belonging to a selected PI.
- MyResearch PI Current Effort Distribution Report: Lists all the funding sources with percent of effort for the selected PI.
- Accounting View of Payroll Report: Provides a list of employees paid by a selected Restricted Fund (box 1) by fiscal period. This report is secured to display data for only those funds for which the user is assigned as the Grant Manager.
- MyResearch Project Summary Report: Lists key data on all proposals and active awards for a selected PI belonging to a selected PI.
- Grants Management Guide for MyResearch Reports: Provides step-by-step instructions on how to use the MyResearch reports.

Numbered arrows indicate crosswalks from specific MyResearch report sections to corresponding Grants Management reports:

- Arrow 1 points from the 'Submit New' section of the MyResearch interface to the 'MyResearch Project Summary Report' icon.
- Arrow 2 points from the 'Manage Active Projects' section to the 'MyResearch Financial Summary' icon.
- Arrow 3 points from the 'Funding Opportunities and Grant Applications' section to the 'MyResearch Personnel Report' icon.
- Arrow 4 points from the 'Disclosures and Agreements' section to the 'MyResearch Summary Awards' icon.

Keys to matching what your PI sees: 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

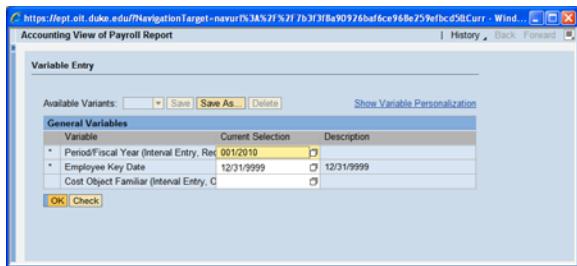
Available to be run by anyone with the Grants Management tab on their Duke@Work **AND** is assigned as Grant Administrator on Projects/WBSEs

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

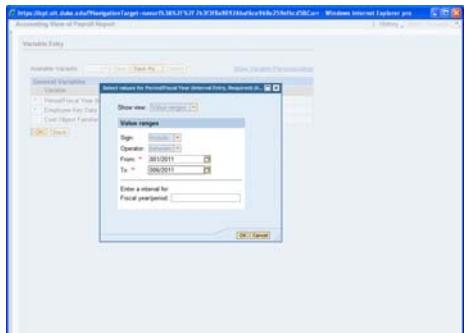
Make sure you enter the Fiscal Month as a 3 digit months (001, not 01) to make sure it executes correctly.

New: 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



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

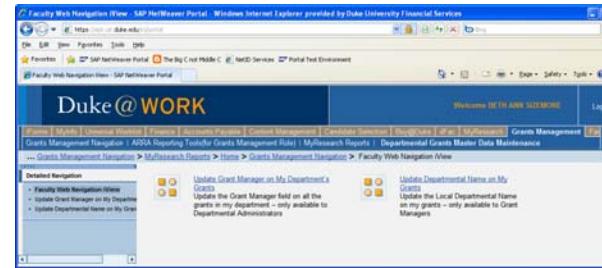
Available to anyone set up as Department Administrator (this role is maintained by the Office of Sponsored Programs)

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)

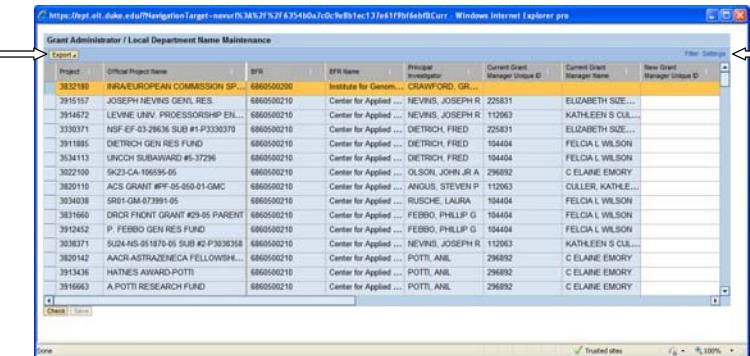
Export functionality is also being added, it will be available within the next week or two.



Select: Departmental Grants Master Data Maintenance



Select: Update Grant Manager on My Department's Grants



Project	Official Project Name	SFR	SFR Name	Principal Investigator	Current Grant Manager Unique ID	Current Grant Manager Name	New Grant Manager Unique ID
322180	IRRA-EUROPEAN COMMISSION SP...	6860500200	Institute for Genome CRAWFORD, GR...	NEVINS, JOSEPH R	225831	ELIZABETH SIE... KATHLEEN S CUL...	
391517	JOSEPH NEVINS GENL RES	6860500210	Center for Applied ...	NEVINS, JOSEPH R	112063		
3914672	LEVINE UNIV PROFESSIONAL EN...	6860500210	Center for Applied ...	NEVINS, JOSEPH R	225831		
330371	NSF-EA-32836 SUB #1 P3393070	6860500210	Center for Applied ...	DETROTH, FRED	184464	FELICIA L WILSON	
3911885	DETROTH GEN RES FUND	6860500210	Center for Applied ...	DETROTH, FRED	184464		
3544113	UNICOI SUBAWARD #5-37296	6860500210	Center for Applied ...	DETROTH, FRED	184464		
3622160	503-C-A10536-05	6860500210	Center for Applied ...	OLSON, JOHN JR A	296932	C ELAINE EMORY	
3625110	ACS GRANT #P-05-050-01-GMC	6860500210	Center for Applied ...	ANGUS, STEVEN P	112063	CULEK, KATHLE...	
3634838	SR01-GM-073991-05	6860500210	Center for Applied ...	RUSCHE, LAURA	184464	FELICIA L WILSON	
3631660	DOD FRONT GRANT #29-05-PARENT	6860500210	Center for Applied ...	FERBO, PHILLIP G	184464		
3912452	P. FERBO GEN RES FUND	6860500210	Center for Applied ...	FERBO, PHILLIP G	184464		
3630371	SU24-NR-051870-05 SUB #2 P3030364	6860500210	Center for Applied ...	NEVINS, JOSEPH R	112063	KATHLEEN S CUL...	
3620142	AACR-ASTRAZENECA FELLOWSH...	6860500210	Center for Applied ...	POTTI, ANIL	296932	C ELAINE EMORY	
3913436	HATHES AWARD-POTTI	6860500210	Center for Applied ...	POTTI, ANIL	296932	C ELAINE EMORY	
3696663	A.POTTI RESEARCH FUND	6860500210	Center for Applied ...	POTTI, ANIL	296932	C ELAINE EMORY	

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.

Settings

Column Selection	Sort	Filter	Display
<input type="checkbox"/> Selected Columns			
<input type="checkbox"/> Unselected Columns			
Official Project Name			
Org Unit			
BFR			
BFR Name			
Principal Investigator			
Current Grant Manager Name			
New Grant Manager Unique ID			
New Grant Manager Name			

Add Remove Change Sequence

OK Cancel Apply

Grant Administrator / Local Department Name Maintenance

Export

Project	Official Project Name	BFR	BFR Name	Principal Investigator	Current Grant Manager Unique ID	Current Grant Manager Name	New Grant Manager Unique ID
382150	INSTITUTE FOR AGRICULTURAL COMMISSION SP...	6806500200	Institute for General ... CRANFORD, GR...				
391515	JOSEPH NEVINS GENL RES	6806500210	Center for Applied ... NEVINS, JOSEPH R	225031	ELIZABETH SIEDE...		
3914672	LEVINE VINYL PROCESSORSHIP EN...	6806500210	Center for Applied ... NEVINS, JOSEPH R	112063	KATHLEEN S CUL...		
333071	NSF-02-02656 SUB #1-P3330370	6806500210	Center for Applied ... DIETRICH, FRED	225031	ELIZABETH SIEDE...		
3911885	DIETRICH GEN RES FUND	6806500210	Center for Applied ... DIETRICH, FRED	160404	FELICIA L WILSON		
354113	UNICO SUBAWARD #5-37296	6806500210	Center for Applied ... DIETRICH, FRED	160404	FELICIA L WILSON		
302100	SKC3-A 95555-05	6806500210	Center for Applied ... OLSON, JOHN R	296982	C ELAINE EMORY		
302110	ACS GRANT #95-050-01-GMC	6806500210	Center for Applied ... ANGUS, STEVEN P	12063	CULLER, KATHLE...		
3034038	SR01-MON 073915-01	6806500210	Center for Applied ... RUSCHE, LAURA	160404	FELICIA L WILSON		
3811660	DRCR FRNT GRANT 429-05-PARENT	6806500210	Center for Applied ... FEBBO, PHILIP G	160404	FELICIA L WILSON		

Done

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.

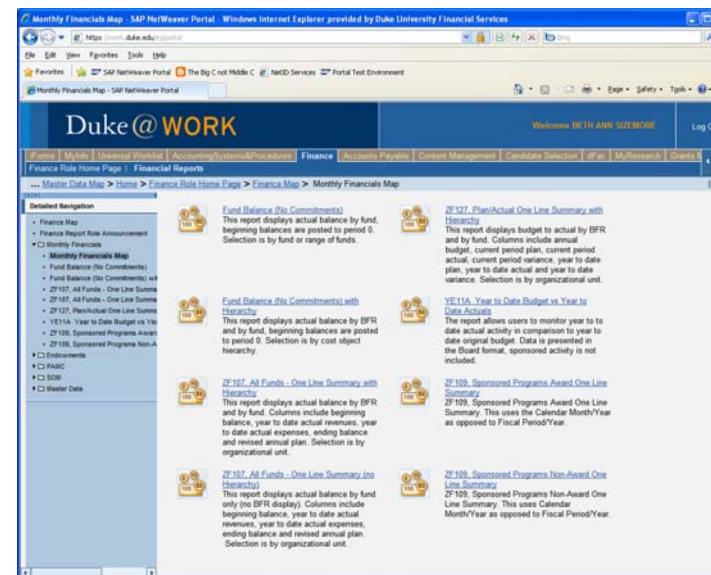
You can also click on the “Filters” tab to apply filters to the data, perhaps by filtering on a specific Grant Admin or PI.

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.



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

Variable Entry

Variable	Current Selection	Description
Duke Cost Object Hierarchy	+OU6860500200	Text OU6860500200 Institute for Genome
Cost Object (Fund Code)		
Responsible Person		
Calendar Month/Year	05/2011	05/2011

Available Variants: Save | Save As... | Delete | Show Variable Personalization

General Variables

OK | Check

NOTE: Duke Cost Object Hierarchy: This is where you can enter a BFR, but you need to ALWAYS precede 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

Duke@WORK

Welcome BETH ANN SZEMORE | Log Off

Master Data Map - SAP NetWeaver Portal

Detailed Navigation

- Finance Map
- Finance Report Role Announcement
- Monthly Financials
- Endowments
- PACIC
- Grant
- Master Data
- Master Data Map
- Fund Attribute
- Departmental Administrator Report
- JVAppliers Report
- Update Responsible Person on My Cost Centers

Approver Report

This report provides a list of approvers assigned to funds - primary sort by fund category.

Departmental Administrator Report

This is a report of Departmental Administrators by BFR.

Update Responsible Person on My Cost Centers

Parameter Entry

Iorg : Enter BFR:

New value: 6860500201 | Add

Current value: No current value has been set.

Execute | Expand All | Collapse All

Enter BFR and then click "Add" button

Parameter Entry

Iorg : Enter BFR:

New value: 6860500201 | Add

Current value: 6860500201

Execute | Expand All | Collapse All

Click on Execute Button

Main Report

Departmental Administrators
Starting with: 6860500201 50043750

Org	BFR	Description	Due#	Name
50043750	6860500201	IGSP	00106366	DONNA P CRUTCHFIELD

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

The screenshot shows the SAP Project Definition screen with a context menu open over the 'Project Definition' button. The menu items are: Project Def., WBS Element, Details, Extract, System, and Help. The 'Project Def.' item is highlighted with a yellow background and black text. The 'WBS Element' item is also highlighted with a yellow background and black text. The 'Details', 'Extract', 'System', and 'Help' items are in white text on a grey background.

Enter Project/WBSE number in the Project field, click on Project Definition icon

Display Project: Project Definition

Settlement rule

Project Def.	3833146	5F30-CA-014236-30 SLB #39-F3033145	
Basic data		Administration	LongText
Status	System Status: REL		
User status			
Project coding mask		Mask ID	
Responsibilities			
Person Responsible	LIERLY, HERIBERT K.		
Applicant no.	3883987 DMHD, PHS, NHI, NC1		
Dates			
Start date	01/01/2004		
Finish date	12/31/2004		
Action required	UR		
Time unit	RSB		
First start date			
Finish date (?)			
Organization			
Co. site	DIRE		
Company code	8888		
Business area			
Plant	DIRE		
Location			
Functional Area			
Profit Center	11999999		
Purchasing	USD		

Follow menu path: Details > Project Definition Customer Fields

Display Project Definition:

Settlement rule:

Sponsored Programs Customer Fields							
Project Definition	2030238						
Project Period Dates	Begin: 09/27/2007 End: 06/30/2011 BPS Number: 172963 Premark Office: GIA						
Dept. / Admin Unit:	106366 DONNAP CRUTCHFIELD						
Organization Manager:	300556 CATHERINE J SCAMBER						
Person Responsible (P#) #2	Alt. Approver: []						
Dept. / Project Name:	[]						
Required Reporting Fields:							
Fund Code - Long Text:	COMPREHENSIVE IDENTIFICATION OF ACTIVE FUNCTIONAL ELEMENTS IN HUMAN CHROMATIN						
Subdivision Name:	[]						
CDSA Number:	DUNS# []						
Federal Prime Grant Number:	Fed Prime Sponsor Name []						
Letter of Credit Attribute:	FMS LOC Document ID A						
BPA Code:	8886500201						
Billing Section:	E P. Thompson, patl.thompson@duke.edu; 604-5803						
Award Details:							
Plan Y Total Award Amount:	740,969.00	Cost Sharing: NIH Sal. Cap:	[]	Direct Costs:	[]	Indirect Costs:	[]
Carryforward Allowed:	Y	Modular Grant Y Contract:	[]	Fixed Price Cont. Cap:	[]	Program Income:	[]
ARRA NO:	[]	CAS:	[]				
F&A Calculation Fields:							
Calculate F & A Cost:	T						
Affiliation Code:	M0001-0-0	Recovery Distribution Code 2					
Theoretical Cont. Cost Percentage:	58.980	Allowable F & A X % 58.980					
Theoretical Cont. Element Group:	SPIDC02	Allowable GE Group SPIDC02					
Departmental Discretionary Fund 1:	Fund 1 Percentage:						
Departmental Discretionary Fund 2:	Fund 2 Percentage:						

This screenshot shows the SAP Display Project Definition screen. It displays award details such as CFDA Number, Federal Prime Grant Number, PHS LSC Document ID, Billing Section, and Award Details. It also shows the FCTR (PMOD) Fields section, including Appropriation Code, Theoretical F & A Cost Percentage, Theoretical Cost Element Group, Departmental Discretionary Fund 1, Departmental Discretionary Fund 2, and FCTR (PMOD) Fields. The Budget Period Definition section lists Period 1 through Period 5 with their respective start and end dates.

This screenshot shows the SAP Dynamic Selection screen. It includes sections for Dynamic Selections, Dynamic Selections (DB profile), Project Management Selections (DB profile), and Selection values. The Project Management Selections section shows a Project range from 2000000 to 3999999, and the Selection values section shows Plan Version 0, Fiscal Year 2011, and Current Period 15. The Multiple Selection icon is highlighted.

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

This screenshot shows the SAP ITD PROJ report. The grid displays financial data across various cost elements, including Salaries and Wages, Fringe Benefits, and Professional Services. The columns include Cost elements, ITD Plan, Curr. No Actual, YTD Actual, ITD Actual, Balance, and Commitments. The data shows various amounts for different categories like Research, Instruction, and Service.

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

- 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.

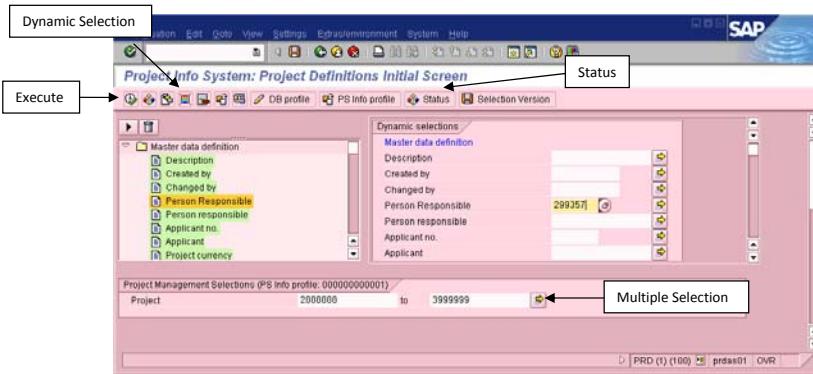
NOTE: To NOT include Closed codes in your report, click on the STATUS icon and Enter “CURRENT” in the Project Definitions box, click on Green check mark to Continue

Example, Project Inception To-Date Report – Transaction ZFR1E

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.

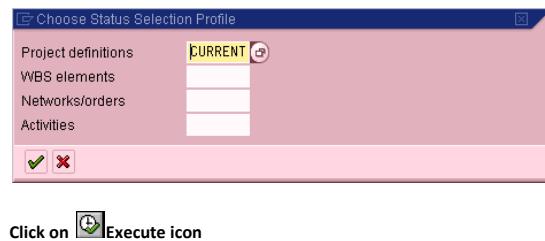
Click on Dynamic Selection Icon



Enter desired selection criteria – you can run by BFR, PI, Grant Admin ID, Parent or for combinations of criteria.

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

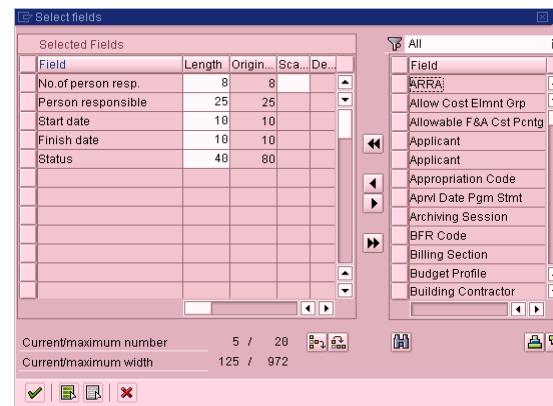
Click on Status icon and Enter "CURRENT" in the Project Definitions box, click on Green check mark to Continue



Click on Execute icon

Project Info System: Project Definitions Overview						
No. of Project def.	Project def.	Responsible	Person responsible	Start date	Finish date	Status
Total						
2030193	00207227 ANGRIST, MISHA	04/01/2010	03/31/2011	REL // ADV		
✓ 3020010	00290357 WILLARD, HUNTINGTON F	05/01/2009	04/30/2010	REL // AGPT		
✓ 3020011	00299357 WILLARD, HUNTINGTON F	05/01/2009	04/30/2010	REL // AGPT		
✓ 3020136	00299357 WILLARD, HUNTINGTON F	05/01/2010	04/30/2011	REL // NCR		
✓ 3020138	00299357 WILLARD, HUNTINGTON F	05/01/2010	04/30/2011	REL // NCR		
✓ 3020973	0031643 CRAWFORD, GREGORY E	09/01/2006	08/31/2010	REL		
✓ 3031643	0031643 CRAWFORD, GREGORY E	07/01/2009	06/30/2010	REL // AGPT		
✓ 3031644	0031643 CRAWFORD, GREGORY E	07/01/2009	06/30/2010	REL // AGPT		
✓ 3031645	0031643 CRAWFORD, GREGORY E	07/01/2009	06/30/2010	REL // AGPT		
✓ 3031696	0031643 CRAWFORD, GREGORY E	07/01/2009	06/30/2010	REL // AGPT		
✓ 3031697	0031643 CRAWFORD, GREGORY E	07/01/2009	06/30/2010	REL // AGPT		
✓ 30324036	00303504 CHADWICK, BRIAN P	02/01/2008	08/09/2009	REL		
✓ 3034838	00316267 RUSCHE, LAURA	04/01/2008	03/31/2011	REL		
✓ 3034947	00376441 SULLIVAN, BETH A	09/01/2005	01/31/2010	REL		
✓ 3034950	00299357 WILLARD, HUNTINGTON F	04/01/2006	03/31/2011	REL		

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.*)

Uses for this report include: 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 1st, 2011
- Projections – Pilots July 1, 2011
- Document Imaging – Target go-live July 2012

5) Online instructions are available at: R3.DUKE.EDU

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