

## Tech Talk

Beth Carter, Debbi Nixon & Joseph Rusnak 11/10/2015

## Agenda

- Mobile App for Grant Balances
- Workflow Reports by Cost Object
- Effort and Payroll Tools and Reports
- CoreResearch@Duke
- SPS No Cost Extensions



#### **Mobile Applications** • Available on Duke Mobile Duke i ii 1 OPEN ¢ **,**.... NEWS 2 PLACES EMERGENCY MAPS SOCIAL MEDIA EVENTS NEWS DIRECTORY MY \$155 SAKAI Duke C ATHLETICS COURSES TRANSPORTATION MYDUKE LIBRARY EPRINT SAKAI 4 Waged Duke ..... DINING DUKECARD SCHOLARS@DUKE RESEARCH DUKE@WORK ADMIN 2015 Symposium for **Research Administrators** 2015 Symposium for **Research Administrators** • Grant Balances for PI (MyResearch Role) and GM (Grants Management Tab) Duke **RESEARCH ADMIN** COI FORM > **GRANT BALANCES - GM** GRANT BALANCES - PI



- Sponsored Research Codes only
- Shows Current Balance real time
- Shows Projected Balances from Projection Tool
- Provides current effort for employees funded

Direct Cost Total Cost	Detail	FOCUS 1-BONSIGNORI	
OCUS 1-BONSIGNORI	154,618	2033495: 06/30/2019	
2033495: 06/30/2019	>		
FOCUS 1-FERRARI	70,185		
2033496: 06/30/2019	>	Category De Effort Other Info	
FOCUS 1-GAO	127,850	Current Available Balances	
2033497: 06/30/2019	>	Sponsored Programs Revenue	295,953
OCUS 1-HAYNES	351,210		
2033498: 06/30/2019	>	Salaries and Wages	35,077
OCUS 1-LIAO PROTEIN EXPRESSION	350,927		0.405
2033500: 06/30/2019	>	Fringe Benefits	6,435
OCUS 1-TOMARAS	29,129	Lab Supply Expense	89.514
2033501: 06/30/2019	2		
BEST PROJECT EVER	4,064,611	Other	23,591
2038617: 08/31/2019	· · · · · ·		
W81XWH-11-1-0301	46,554	Total Direct Costs	154,618
3130245: 07/31/2015	Project Ended		Ŷ



- Workflow Status Report by Cost Object
  - Grants Management Tab > Sponsored Research Reporting
  - Finance Tab > Workflow Status Report
  - Non-iForms Workflow items
- Grant Manager iForms Workflow Status by Cost Object
  - Grants Management Tab > Effort and Payroll Tools and Reports
  - iForms in workflow only



Image:											
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# DEMO

### Effort and Payroll Tools and Reports on Duke@Work

- Employee Data Search
- iForms Status Overview
- Institutional Base Salary Employee
   Search Will only show if you
   have the role
- Weighted Average Report
- Cost Distributions by Cost Object
   Org Unit
- Cost Distributions by Employee Org Unit



<u>Training materials:</u> https://finance.duke.edu/research/training/other.php

#### 2015 Symposium for

Research Administrators

### **Employee Data Search**

### Features:

- View Faculty Appointment, Education, TPE and Cost Distributions (Past and Current)
- Initiate iForms
  - Cost Distributions
  - Initiate Supplement Payment iForms
  - Initiate Manual Salary Cost Transfer iForms





2015 Symposium for Research Administrators



Cost Distribution - Current

Begin Date	End Date	Cost Center	WBS	Cost Object Description	ST	SC	PCT
02/01/2015	12/31/9999		3910434	MURDOCK-GIFT	60	31	10.00
02/01/2015	12/31/9999		3910447	CTR PERSONAL MED FUND	60	13	4.00
02/01/2015	12/31/9999		3936130	NOVARTIS VAC & DIAGN OPTION AGRMNT	60	36	3.80
02/01/2015	12/31/9999		3833212	BILL & MELINDA GATES #OPP1017554 PARENT	60	36	16.00
02/01/2015	12/31/9999		3833213	GATES #OPP1017554 SUB #1-P3833212	60	36	11.00
02/01/2015	12/31/9999		2031605	5R01-GM081416-07	60	36	2.50
02/01/2015	12/31/9999		2031605	5R01-GM081416-07	60	34	1.50
02/01/2015	12/31/9999		3130413	FA8650-13-2-6374	60	36	3.00
02/01/2015	12/31/9999		2033302	5R01-HL118049-02 PARENT	60	36	2.50
02/01/2015	12/31/9999		2033751	5U01-HG007282-02 PARENT	60	36	6.30
02/01/2015	12/31/9999		2033302	5R01-HL118049-02 PARENT	60	34	1.50
02/01/2015	12/31/9999		2033751	5U01-HG007282-02 PARENT	60	34	3.70
02/01/2015	12/31/9999		3130493	W911NF-14-1-0052	60	36	3.00
02/01/2015	12/31/9999		2033756	5U01-HG007282-02 SUB #5-P2033751	60	36	4.50
02/01/2015	12/31/9999		2033756	5U01-HG007282-02 SUB #5-P2033751	60	34	2.50
02/01/2015	12/31/9999		3934561	BMS AGRMN'T MINI #1-COMP 3934559	60	36	9.00
02/01/2015	12/31/9999		2034241	5UM1-AI104681-03 SUB #27-P2038641	60	36	1.90
02/01/2015	12/31/9999	4416289		FACULTY RESEARCH ADMIN FUND	60	31	1.20
02/01/2015	12/31/9999		2034241	5UM1-AI104681-03 SUB #27-P2038641	60	34	1.10
02/01/2015	12/31/9999		3836862	JACKSON FNDNT AGRMNT #2456/PO #808925	60	36	10.00
02/01/2015	12/31/9999		3836951	MERCK, SHARP & DOHME COLLABORATION AGRT	60	36	1.00

#### Cost Distribution - All (Past, Current, Future)

Begin Date	End Date	Cost Center	WBS	Cost Object Description	ST	SC	PCT
09/01/2004	06/30/2005	4410101		DR. GEORGE JETSON START-UP FUND	60	31	100.00
07/01/2005	12/31/2005	4410101		DR. GEORGE JETSON START-UP FUND	60	31	50.00
07/01/2005	12/31/2005		3690104	DE-INST. FOR PROSPECTIVE HLTH #5422-SP	60	31	50.00
01/01/2006	08/31/2006	4410101		DR. GEORGE JETSON START-UP FUND	60	31	100.00
09/01/2006	09/30/2006	4410101		DR. GEORGE JETSON START-UP FUND	60	31	95.00
09/01/2006	09/30/2006		3036490	5P01-HL-073042-05 PARENT	60	36	3.90

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### **iForms Status Overview**

• View the status any submitted iForms that you have submitted

					Personalize	Filter On
Description	Notification	Status	Created On	Employee Name	Personnel Number	Revers
Request for Cost Distribution Change	000400940097	Open / For Approval	9/14/2015	CHRISTINE W TOBIAS	00302441	Revers
		Status Overviev	/			
		Created By EL	ZABETH SIZE	EMORE 11/10/2014 20:00	53	
		Sent To DUKE	EMPLOYEE	11/10/2014 20:01:57 5000	1723 STAFF01	
		Sent To KARE Sent To TODD	ORR 11/10/2	10/2014 20:01:57 5000172 014 20:01:57 50001723 S	I STAFFU1	



### Institutional Base Salary Employee Search

- Links will NOT appear if you do not have the required role
- Provides access to Institutional Base Salary and Admin Supplements
- Ability to print Redacted Salary Verification Sheets
- Requires a separate security role
- Secured at the Org Unit

ympos esearc	ium for h Administrators
	Weighted Average Report
<u>F</u> ( ●	<u>eatures</u> Displays 12 months of salary and effort percentages <b>based on month of effort</b>
•	Reports Base and Supplemental pay separately Available to GM1/GM2/Payroll Reconcilers
•	Executed for a single WBSE Different views for Exempt and Non-Exempt





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## Weighted Average Report

# DEMO

### **Cost Distribution Reports**

- Cost Distributions by Employee Org Unit
  - Provides the current cost distribution for all employees listed in the Organization unit that the report is run for.
- Cost Distributions by Cost Object Org Unit
  - Provides the current cost distribution of anyone funded on cost objects in the Organization unit that the report is run for.



19



## **Cost Distribution Reports**

# DEMO



23





The centrally supported, enterprise wide, booking to billing system to support operations of shared resources

#### 2015 Symposium for

Research Administrators

### SPS Web – No-Cost Extension Requests

- RADs Charge: Provide a consistent, simplified and transparent process for requesting and tracking NCE Requests (anticipated delivery Jan 2016)
- Advantages
  - Consistent process within ORA/ORS/DOCK
  - Visibility of actions and status throughout the request
  - NCE Requests now linked to award information in SPS
  - Departmental Checklist will provide additional guidance (Checklist and new institutional procedures will be rolled out in conjunction with new form)

\* Powered by Research Application Development (RAD) Team and Closeout Project Working Group





PIFPD Name Karen Welty-Wolf S   Owning Duke Org 6660105000 - Molecular Genetics and Microbiology   NCE Status Submitted   NCE Initiator Seffani H. Webb S   Prime Sponsor Prime Sponsor   PCE Dept Medicine - General   * Duke Approved O Sponsor Approved * Sponsor Approved * Sponsor Approved * Duke Approved O Sponsor Approved * Justification * Outlee Approved O Sponsor Approved * Justification * Justification * Justification * Justification * Outlee Attached By * Outlee Attached By * Attached * Attached * Attached * Outlee Attached By * Outlee Attached By * Outlee Attached By * Attached * Outlee Attached By * Attached * Outlee Attached By * Outlee Attached By * Outlee Attached By * Attached By * Outlee Attachee Attachee Attachee By * Outlee Attachee Attachee Attachee Attachee Attachee		SPS - Awards Search Debera H. Nixon-NSF (SPS_DEV) (dkhnixon) -	Search lequest Information for Pi	roposal #105870		Debera H. Nixo     NCE Request Ac	n-NSF (SPS_DEV) (dkhnixon) 🔹
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PI/PEP Name Karen Welby-Wolf S Current State AWARD   Owning Duke Org 6900105000 - Molecular Genetics and Microbiology NCE Status Submitted   NCE Initiator Type of No-Cost Extension Request © Duke Approved Sponsor Approved * Justification Supporting Documentation, if needed, such as authorization letter from sponsor, etc. Attach Operantmental NOA 5R01-HL123456-05.pdf 10/28/2015 at 00:38am dkinixing © Charlen Laware Contact Moore, Roberta A. Moore, Roberta A. © Operantmenta has taken appropriate actions as defined by the Departmental NCE Checklist. © Department has taken appropriate actions as defined by the Departmental NCE Checklist.	a	- Oracle Enternation Descurate Information for Descurate #405020	equest Information for Pr	roposal #105870		NCE Request Ac	tions -
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