Projects Approaching End Date Report
To be used to identify projects ending in the next 3 months. This report also allows for drilldown to the Project Obligations Report.

1. Open a web browser (Internet Explorer 9 or below, Firefox) and to go to the Duke@WORK web site (https://work.duke.edu).

![Duke University NetID Services]

2. On the Duke University NetID Services screen, enter your NetID and Password.

3. Click on the Enter button to proceed to the Duke@WORK web site.

![Duke@WORK]

4. On the Duke@WORK screen, click on the Grants Management tab.
5. Click on the **Sponsored Research Reporting** link.

6. Click on the **Projects Approaching End Date Report** link.
Projects Approaching End Date Report Screen:

[Workflow Report Link]
General Accounting Procedures
Payroll Deadlines
* Applicable deadline for cost distribution changes is in column labeled 'IFORMS'
* Note: Ensure correct deadlines are reviewed based on employee category (monthly/biweekly)
To run Projects Approaching End Date Report:

A. Required: Enter either the desired BFR code (10 digits) in the BFR Selection field to select all WBS elements (project numbers) associated with that particular BFR code or a single WBS Element or a range of WBS Elements in the WBSE selection field.
   i. Use the Multiple Selection button to enter more than one BFR or WBS Element.

   **NOTE:** There are no security limits or ownership rules currently set for this report. If you have access to the Grants Management tab, you can run this report for any open project or group of projects.

B. Required: Enter the desired Fiscal Year and Fiscal Period – based on the value entered, the report will return projects ending in the 3 months FOLLOWING the period entered.

C. Optional: Enter a personnel number in the Grant Manager field to narrow the report to WBS Elements (projects) with a particular person listed as GM1 in SAP. You may also enter the personnel number for the Responsible Person (PI) in the Responsible Person field.
a. If the personnel number of the Grant Manager or Responsible Person is unknown, use drop down in the right corner of the field to perform a search based on the name and select the corresponding number from the list. Enter the first and/or last name in ALL CAPS.

D. Click Search.

E. The bottom of the report includes links to General Accounting Procedures (GAPs) as well as payroll deadlines, and a link to the Workflow Report.

Projects Approaching End Date Results:

- Project # lists the WBSE for the project.
- Parent # lists the parent WBSE for the project.
- Project Description Lists the Project name in SAP
- BFR # is the owning BFR for the WBSE
- BFR Description is the name of the owning BFR
- GM Name is the Grant Manager 1 listed in SAP
- PI name is the responsible PI in SAP
- Project end date is the WBSE end date in SAP
- Sponsor Report Due Date is the date final reports are due to the sponsor
- Closeout Docs Due Date is the date closeout documents are due to OSP

Drilling down on the Projects Approaching End Date Report:
A. Clicking on either the Project # or Parent # will drill down to the Project Obligations Report. Clicking on the Project # will drilldown to the Project Obligations Report returning information for the Project #. Clicking on the Parent # will drilldown to the Project Obligations Report returning information for all Projects associated with that Parent #.

B. The drill down /Project Obligations Report is used to identify payroll and purchase order encumbrances. More information on using this report can be found in the Project Obligations Report Step by Step.

To rerun the Projects Approaching End Date Report with new selection criteria:
A. To update the report while keeping some of the selection criteria the same, you can modify the selection criteria, and re-submit the report:
   i. Change the BFR or WBSE selection
   ii. Change the Fiscal Year or Fiscal Period
   iii. Change the Responsible Person or Grant Manager

**NOTE:** See page 4 for details on required and optional fields in the selection criteria.

B. Click Search.
Exporting, Filtering and Sorting the Results Screen:

Results will display in the “Results” tray. The data is sorted by Project End Date. Below are ways to export, sort and filter the results.

7. After running the Projects Approaching End Date Report, the Results screen will appear. This data can be exported to Excel by clicking on the Export button and then clicking on Export to Microsoft Excel

Depending on your browser, you will be prompted to Open, Save or Cancel the download—choose “Open.”

A. Download prompt in Internet Explorer
B. Download prompt in Firefox
8. Filter the data by clicking on the Funnel button. Clicking this button will create a filter row – the blank row under the column heading.
   NOTE: To remove the filter, re-click on this funnel. This will remove all data filters.

9. Click in the filter row and type in the filter.

10. To sort the data, click on the column heading you wish to group data. The view above is sorted by GM Name, which is denoted by the small triangle in the right side of the column header. Sorting the Results Screen:
11. To sort the results screen by a particular column, hover over the column and left-click. The results will sort in ascending order by the column selected. To sort in descending order, left-click the column a second time. A small gray arrow pointing upwards will appear in the column header to indicate that the data is sorted in ascending order.

12. If data is sorted in descending order, a small gray arrow pointing downwards will appear in the column header.

**Resetting the Results Screen:**

To remove all filters and sorts, you can reset the results screen:

13. To erase all saved filters/sorts and return data to original view, right-click on the Results bar, select User Settings, then click More…
14. Under Advanced Options, click Reset User Settings for Running Application. This will erase all currently saved filters and sorts for the current data.