


Training Departmental Users
Presented by: Christin Nelson
ND HEUG Conference
March 17, 2009



Topics:

- Setting up a RUN control
- PI Report
- Commitment Control KK
- Award Profile Page
- Project Page
- Project team link
- Setting up a Favorite

Setting up a Run Control

- Select the Add a New Value
- -In the box labeled Run Control ID, create a name for your run control. Use the first initial of your first and last name and then a name that will help you to remember the report. Use the underscore to separate you initials and the report name.
Example: cn_ndu_pi_report
- -Click the Add button
- -Set up a control for each report **only ONCE**. The next time you want to run the report select the Search button under the Find an Existing Value tab.

Running a PI Report

- There are several different fields and boxes that can be selected or completed to gather different data. A description of each box is listed below.
- **Business Unit:** Number assigned to institution
- ***(Required for all PI reports.)***
- **Award:** Main award number
- **Project:** Used to run a PI Report for a project under the main award. The award and project boxes need to be completed.
- **Department:** Number assigned to department Can be use to run all reports for a department by only completing the business unit and department fields.
- **PI:** Principle Investigator. Can be used to run reports for one PI by only completing the PI and Business Unit fields

- **Checkboxes**
- **Sponsor Funding Report-** Required for all PI reports.
- **Cost Share Report-** Runs an additional report that shows the cost share Budget and expenditures.
- **Third Party Report-** Runs an additional report that shows the Third Party Cost Share Budget and expenditures
- **As of Date-** Date through which financial data will be displayed.

PI Report

The screenshot shows a web browser window titled "HE PI Report - Microsoft Internet Explorer". The address bar displays the URL: https://www.connectnd.us/psp/ndfp/EMPLOYEE/ERP/c/NDU_HE_APPLICATIONS.NDU_0101_1. The Oracle logo is visible at the top left of the page. A navigation menu on the left lists various reports and tools, with "HE PI Report" selected. The main content area is titled "PI Report" and contains a "Run Control" section with the ID "cn_ndu_pi_report". A "Run" button is present. The form fields are as follows:

- Business Unit:
- Award:
- Only Active Projects in Award (Y/N):
- Project:
- Dept. Summary *:
- PI:
- Sponsor Funding Report
- Cost Share Report**
- Third Party Report**
- As of Date:

Footnote text: * FYI - If department is chosen with Cost Share or Third Party reports, please keep in mind that all expenditures may not return if an award has multiple departments providing cost sharing. ** If multiple departments are providing cost sharing or have third party transactions posted, a separate report cost share or third party report will print for each.

The Windows taskbar at the bottom shows the Start button, the current application "HE PI Report ...", and other open applications "MISC" and "Microsoft Pow...". The system clock shows "10:34 PM".

Running the PI Report

- Navigation: Grants – Interactive Reports – HE PI Report
- If this your first time running a PI Report, please go to Setting Up a Run Control.
- Click Search
- Select Run Control ID
- Enter the Business Unit
- Enter a. Award ID
 - b. Project ID
 - c. Department
 - d. PI
- Check a. Sponsor Funding Report
 - b. Cost Share Report
 - c. Third Party Report
- Enter the As of Date
- Click Save
- Click the Run button located in the upper right hand corner
 - -User will go to a screen with Process Scheduler Request
- Click the OK button
 - -User will return to PI Report Run screen,
- Click the process monitor hyperlink located to the left of the run button.
 - -User will go to screen with Process list.
- Click the Refresh button until the Run status and Distribution status to change to Success and Posted.
- Click Details hyperlink
- Click Message Log
- Click PDF. File hyperlink

Information on the PI Report

- Upper left hand corner...
- **Award:** PeopleSoft number assigned to a sponsored program – main or contract number
- **Award Name:** Name of the project
- **Award Dept:** Department of PI
- **Agency:** Awarding agency
- **Award PI (Principal Investigator):** Name of the individual who is conducting the research
- **Award Start Date:** State date of award
- **Award End Date:** End date of award

Information on the PI Report

- Upper right hand corner...
- **Project:** PeopleSoft number assigned to a project under an award.
- **Project Dept:** Department of PI
- **F&A Rate:** The percentage of F&A that is being collected by the institution.
- **Project PI:** Principal Investigator
- **Project Start Date:** Start date of project
- **Project End Date:** End date of Project
- **Fund Code:** Fund assigned to Award or Project by Grant Officer.

Information on the PI Report

- There are seven columns on the PI Report, each gives different information about the project.
- **Budget:** Amount awarded.
- **Current Mo. Expenses:** Current month's expenditures from the 1st to the **As of Date** entered.
- **Cumulative Expense:** Cumulative Expenses through the **As of Date** entered.
- **Outstanding Encumbrances:** Amounts of encumbrances not expended.
- **Available Budget:** Remaining amount available from the budget amount.
- **Percent available:** Available budget as a percentage.

Budget Overview

- Navigation: Commitment Control-Review Budget Activities-Budget Overview
- **If this is your first time running Budget Overview, please go to Setting Up a Run Control.**
- Click Search
- Select Run Control ID
- Enter Business Unit: Example UND01
- Enter or Select Ledger Group/Set: Ledger Group
- Enter or Select Ledger Group: GNTDTL
- Enter Project under Chartfield Project under columns ChartField From Value, and ChartField To
- Select Save
- Select Search

Budget Overview

Budgets Overview - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://www.connectnd.us/psp/ndfp/EMPLOYEE/ERP/c/MANAGE_COMMITMENT_CONTROL.KI Go Links Google Search Sign In

ORACLE Home Worklist Add to Favorites Sign out

Menu

- Billing
- Accounts Receivable
- Accounts Payable
- Asset Management
- Banking
- Commitment Control
 - Budget Journals
 - Post Control Budget Journals
 - Review Budget Activities
 - Budget Details
 - Budgets Overview
 - Ledger Inquiry Set
 - Activity Log
 - Review Fund Source Allocations
 - Review Fund Source Activities
 - Close Budget
 - Budget Reports
 - Review Budget Check Exceptions
- General Ledger
- SCM Integrations
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- ND HE Applications
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Amount Criteria Search Clear Reset

Budget Type

*Business Unit: Ledger Group/Set: Ledger Group:
 View Stat Code Budgets Grant Detail Ledger Group
 Display Chart

Time Span

*Type of Calendar:

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	GNTDTL		<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Customize Find View All First 1 of 1 Last

ChartField Criteria

ChartField	ChartField From Value	ChartField To	ChartField Value Set	Update/Add
Account	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/> Update/Add
Dept	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/> Update/Add
Fund	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/> Update/Add
PC Bus Unit	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/> Update/Add
Project	UND0013375 <input type="text"/>	UND0013375 <input type="text"/>	<input type="text"/>	<input type="text"/> Update/Add
Activity	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/> Update/Add

Budget Status

- Open
- Closed
- Hold

Save Return to Search Notify Refresh Add Update/Display

start Budgets Over... MISC Microsoft Pow... Internet 10:42 PM

Budget Overview

- Overview Page- an up to date overview of the project in regards to the budget that is set up, cumulative expenses incurred, outstanding encumbrances, and Available Budget.

Award Profile

- Navigation: Grants – Awards – Award Profile
 - Enter Business Unit
 - Enter Award ID
 - Select Search
-
- Award Profile page lists the Project Number, Agency Award number, Title of project, Award PI, Sponsor, Start Date and End Date.

Award Profile Page

Oracle

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | help

Menu

- ▼ Awards
 - Award Profile
 - Project
 - Project Activity
 - Project Budgets
 - Project Budget Inquiry
 - Commitment Control Errors
 - Negotiate Award
 - Process Facilities Admin
 - Create Continuation
 - Review Award Modifications
 - FA Error Interactive Report
 - Milestone Notification
 - Process Milestone Notification
- ▶ Protocols
- ▶ Institutions
- ▶ Departments
- ▶ Professionals
- ▶ Sponsors
- ▶ Subrecipients
- ▶ Interactive Reports
 - Grants Center
 - My Proposals
- ▶ Program Management
- ▶ Project Costing
- ▶ Proposal Management
- ▶ Billing
- ▶ Accounts Receivable
- ▶ Accounts Payable
- ▶ Asset Management
- ▶ Reporting

Award | Funding | Resources | Certifications | Terms | Milestones | Key Words | Funding Inquiry

Award ID: UND0013375
Reference Award Number: 8-603001-Z-0036-19

Title: ND Small Business Development Center 2008 Cooperative Ag [Description](#)
Award PI: Wikenheiser,Bonita Marie [Reporting Role](#)
Sponsor: Small Business Administration
Purpose: OTHER [Purpose](#) **Status:** Accepted
Award Type: Grant [Award Type](#) **CFDA:** 59.037 [CFDA](#)
Proposal ID: UND0013375 [Proposal ID](#)
Version ID: F1 [Version ID](#)
Start Date: 01/01/2008 [Start Date](#) **End Date:** 12/31/2008 [End Date](#)

[View Contract](#) | [View Proposal](#) | [Additional Information](#) | [Grant Administrator](#) | [Sponsor Website](#)

Primary Project PI: Wikenheiser,Bonita Marie

Associated Project [Customize](#) | [Find](#) | First | 1-4 of 4 | Last

PC Business Unit	Project	Description

start | Budgets Over... | Award Profile ... | MISC | Microsoft Pow... | Internet | 10:46 PM

By selecting the Funding tab located on upper portion of the screen, you can see the full amount awarded under a project number with the start and end dates.

The screenshot displays the Oracle Award Profile web application in a Microsoft Internet Explorer browser window. The browser's address bar shows the URL: https://www.connectnd.us/psp/ndfp_1/EMPLOYEE/ERP/c/ESTABLISH_AWARDS.GM_AWARD.c. The Oracle logo is visible at the top left of the application page. A navigation menu on the left lists various sections such as Awards, Protocols, Institutions, and Departments. The main content area features several tabs: Award, Funding, Resources, Certifications, Terms, Milestones, Key Words, and Funding Inquiry. The 'Funding' tab is currently selected. Below the tabs, the 'Award ID' is 'UND0013375' and the 'Reference Award' is '8-603001-Z-0036-19'. The 'Award PI' is 'Wikenheiser, Bonita Marie'. The 'Total Award Amount' is 530,056.00. A 'Funding Info' section contains a table with the following data:

Period	*Start Date	*End Date	Funded Amount	To Project ID
1	01/01/2008	06/30/2008	532,094.67	UND0013375
2	07/01/2008	12/31/2008		UND0013375

Below the table, there are navigation buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh'. At the bottom of the page, the Windows taskbar shows the 'start' button, open applications including 'Award Profile ...', 'MISC', and 'Microsoft Pow...', and the system clock displaying '11:07 PM'.

Project Page

- Navigation: Grants – Awards – Project
 - Enter Business Unit
 - Enter Project
 - Select Search
-
- **Project page lists the Project, Description, type of funding, Start and End Dates, and a descriptions of what is or is not allowable.**
 - **The Grant Officer of a project can be found by selecting the Project team hyperlink located at the bottom of the screen. The Grant Officer has the project Role of GCA.**

Project Page

Project - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://www.connectnd.us/psp/ndfp_1/EMPLOYEE/ERP/c/ESTABLISH_AWARDS.PROJECT_GEI Go Links Google Search Sign In

ORACLE Home Worklist Add to Favorites Sign out

Menu

- ▼ Awards
 - Award Profile
 - Project
 - Project Activity
 - Project Budgets
 - Project Budget Inquiry
 - Commitment Control Errors
 - Negotiate Award
 - Process Facilities Admin
 - Create Continuation
 - Review Award Modifications
 - FA Error Interactive Report
 - Milestone Notification
 - Process Milestone Notification
- ▶ Protocols
- ▶ Institutions
- ▶ Departments
- ▶ Professionals
- ▶ Sponsors
- ▶ Subrecipients
- ▶ Interactive Reports
 - Grants Center
 - My Proposals
- ▶ Program Management
- ▶ Project Costing
- ▶ Proposal Management
- ▶ Billing
- ▶ Accounts Receivable
- ▶ Accounts Payable
- ▶ Asset Management
- ▶ Banking

General Information Project Department Project Costing Definition Manager Location Phases Approval

Project: **UND0013375** [Add to My Projects](#)

***Description:** ND Small Business Development Program **Processing Status:** Active
Project Status: [Approved](#)

***Integration:** University of North Dakota

Project Type: FEDERAL REVENUE

Percent Complete: **As Of:**

Project Health: **As Of:**

Project Schedule

***Start Date:** ***End Date:** [Additional Dates](#)

Description Find | View All First 1 of 1 Last

Date/Time Stamp: 04/25/08 9:43:50AM **User ID:** chnelson

Description:
travel, supplies, contractual, consultants, communication, data processing, rent/lease, fees, professional development ok

Long Description:

Done Internet 10:47 PM

start Budgets Over... Project - Micr... MISC Microsoft Pow...

The Grant Officer of a project can be found by selecting the Project team hyperlink located at the bottom of the screen. The Grant Officer has the project Role of GCA

The screenshot shows a web browser window titled "Project - Microsoft Internet Explorer" displaying an Oracle web application. The address bar shows the URL: https://www.connectnd.us/psp/ndfp_1/EMPLOYEE/ERP/c/ESTABLISH_AWARDS.PROJECT_GEI. The Oracle logo is visible at the top left. A navigation menu on the left lists various options such as Awards, Project, Project Activity, and Project Budgets. The main content area displays project information for Project ID "UND0013375", Description "ND Small Business Processing Status", and End Date "12/31/2008". Below this, a table titled "Project Team Members" lists two team members: Bonita Wikenheiser (PI) and Christin Nelson (GCA). The table includes columns for EmpID, Name, Project Role, Project Manager, Email Notify, Start Date, and End Date. Below the table are sections for "Add Members Using Job Code" and "Remove Members Using Job Code", each with input fields for Job Code and Default Project Role, and buttons for "Add Team Members" and "Remove Team Members". At the bottom, there are buttons for "Save", "Return to Search", and "Refresh". The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock displaying 10:49 PM.

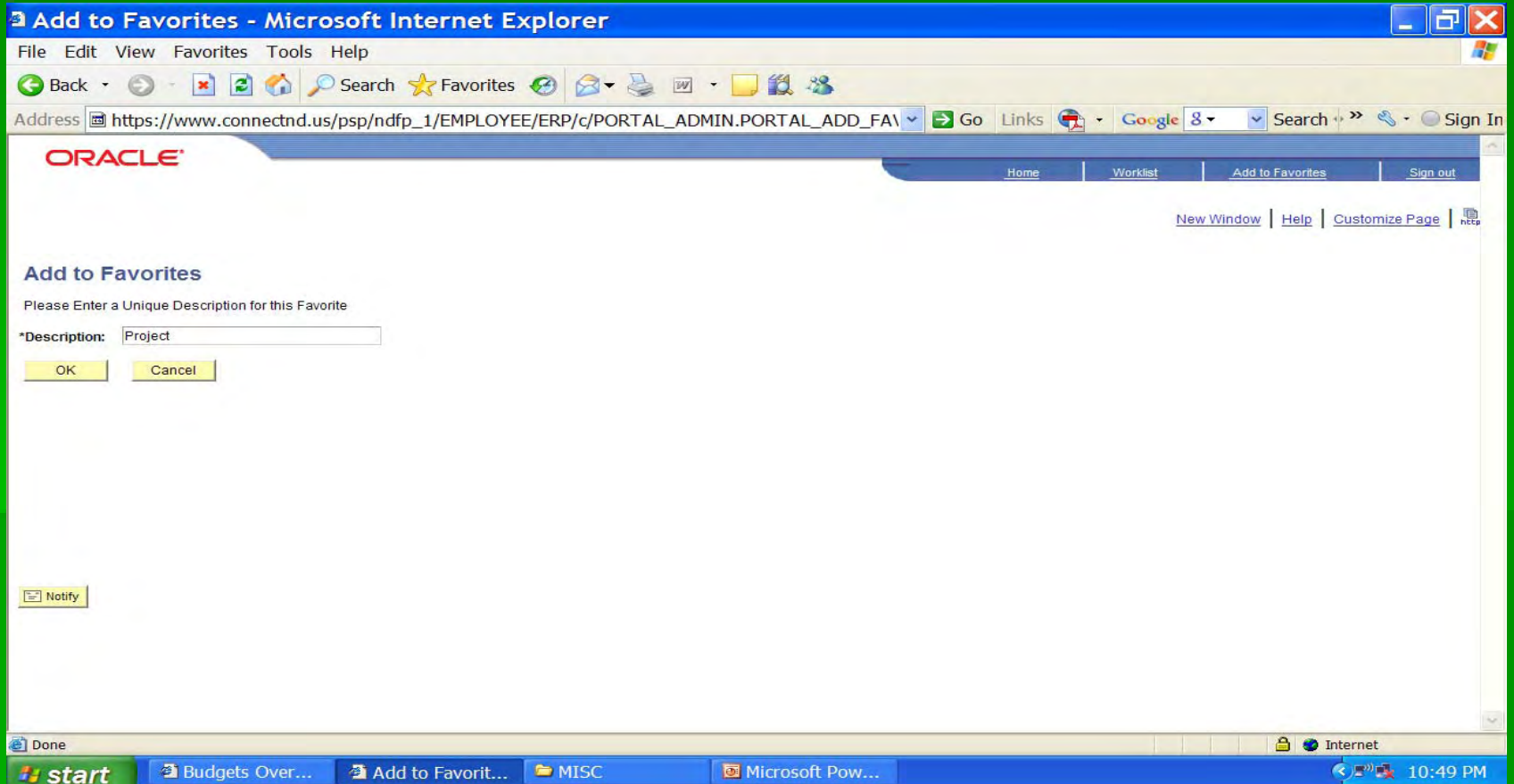
Project Team Members

EmpID	Name	Project Role	Project Manager	Email Notify	Start Date	End Date		
0215061	Bonita Wikenheiser	PI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/12/2007	12/31/2008	<input type="button" value="+"/>	<input type="button" value="-"/>
0418084	Christin Nelson	GCA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/12/2007	12/31/2008	<input type="button" value="+"/>	<input type="button" value="-"/>

Adding a Favorite

- By adding a favorite a user can create a shortcut that allows them to go directly to the desired screen versus through the complete navigation.
- Once on a screen you would like to make a favorite such as the PI Report
- Select the following navigation: My favorites - Add to favorites
- The Add to Favorites Page will appear. In the description box enter a name of the screen that is easily identifiable to you. Example: HE PI Report.
- Select OK
- Verify the favorite was created by selecting My Favorites from the Menu.
-

Add a Favorite





- Questions?

