**University of Alaska
Statewide Financial Systems
User Documentation**

PROJECT ADMINISTRATION

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Project Administration

Project Administration Reporting allows Principal Investigators and Administrators to view details on their projects. This tool is a web interface to the Decision Support Database (commonly referred to as DSD, RPTS, or data warehouse).

A web browser that supports HTML frames and JavaScript is required to access Project Administration. In addition, Project Administration uses the internet network connection when submitting query requests and thus must be internet-connected.

Security access requires that Project Administration users have a valid University of Alaska RPTS database account (user id) and a QMenu web code (password).

★ This documentation was written using the Microsoft Internet Explorer web browser. If another web browser is used, the described steps may vary slightly due to browser-specific steps.

Project Administration Reporting

This report is run to display project information for the logged in ID.

DSD Query Menu Login

A1.   Initiate a web browser (i.e. Internet Explorer or Netscape)

A2.   Navigate to **qmenu.alaska.edu**

A3.   The cursor defaults on the *USERID* field. Enter the **user id**. *<Next Field>*

A4.   The cursor moves to the *WEBCODE* field.   Enter the user **password** and click *<Login>* or depress the *<Enter>* key.
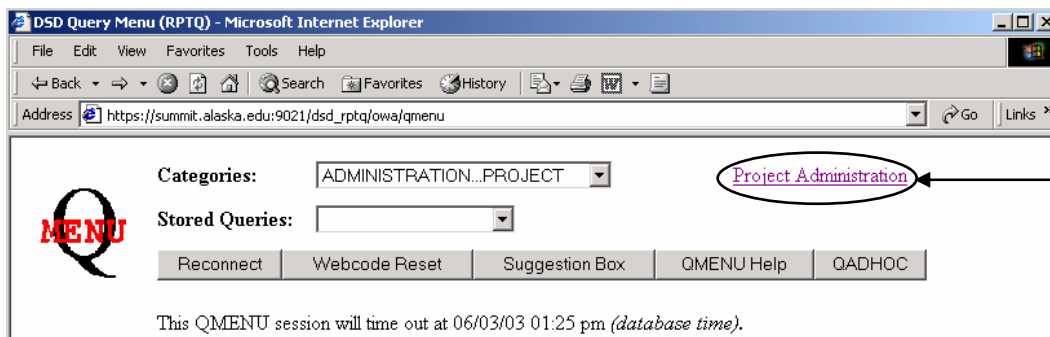
Category / Stored Query Selection

B1.   The QMenu Report Selection fields are displayed at the top of the page.
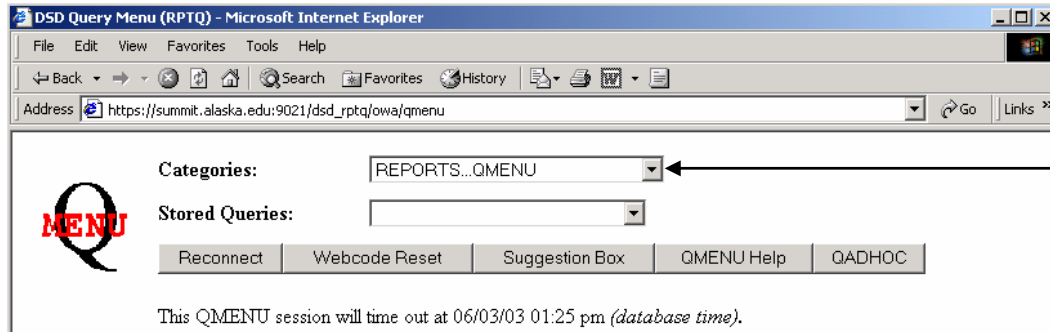
Click the down-arrow to select from the drop-down box

B2.   Under the *CATEGORIES* drop-down selection, choose **Administration…Project**. The *<Project Administration>* link is displayed to the right.
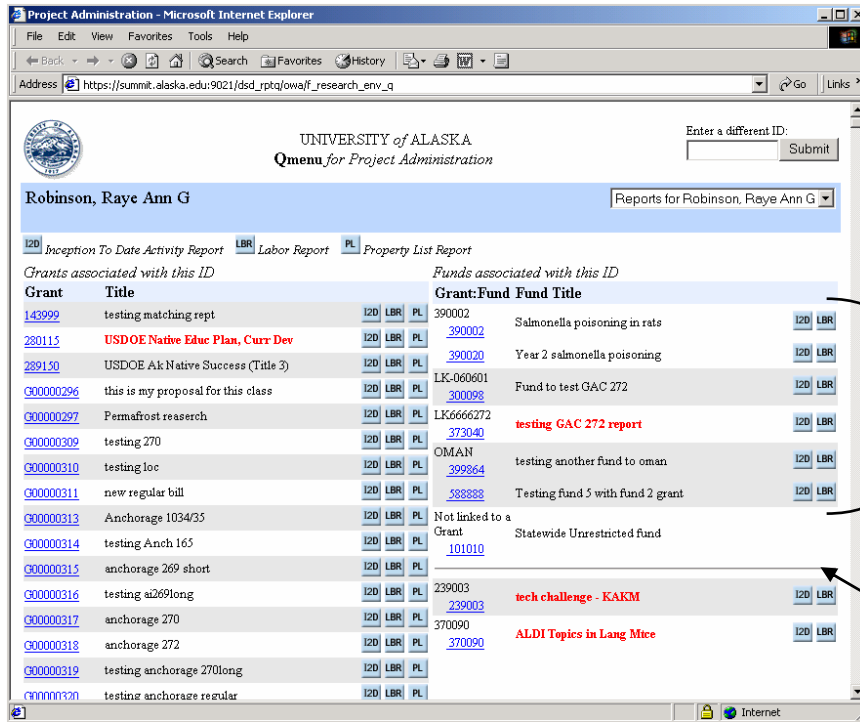

Click the *<Project Administration>* link

B3.   Click *<Project Administration>*.

★   Do not choose **Project Administration** from the *STORED QUERIES* drop down selection. If so, an ACCESS DENIED error message will be displayed.

Report Details

C1. A separate window is displayed which details the grants associated with the logged-in ID.
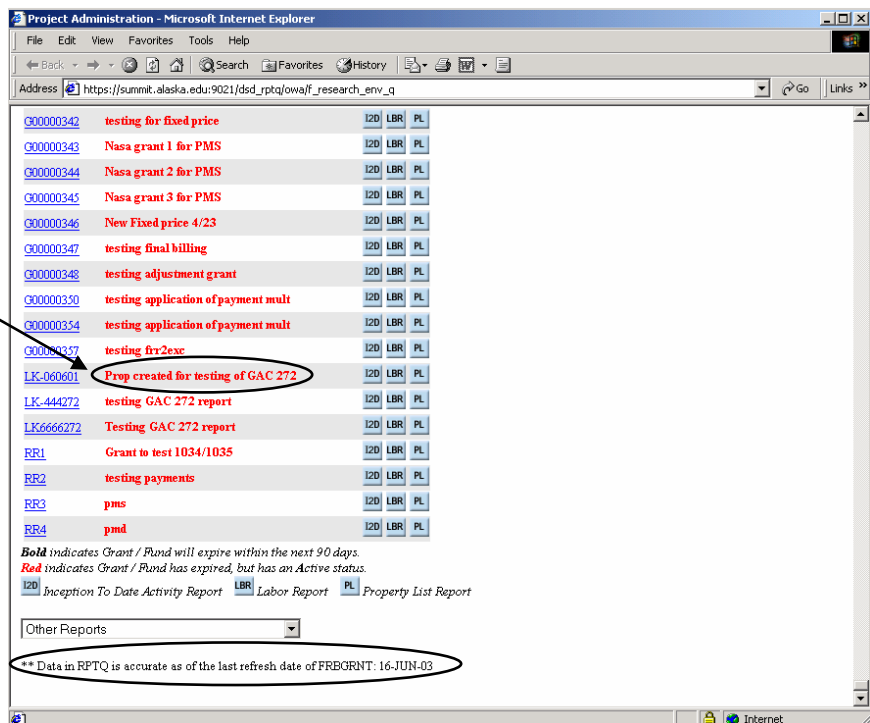

These funds are less than 90 days old.

The horizontal line separates funds less than 90 days old from those that are older than 90 days.

The same is true for the grant display.

Red text indicates that the grant has expired but is still active. This grant is also older than 90 days.

Refresh Date indicates how current the data is

C2.   This report provides a wealth of information about the grants and funds for the requested ID as well as direct links to additional reports.

A grant or fund title displayed in **bold** indicates that the grant or fund will expire within the next 90 days.

A grant or fund title displayed in red indicates that the grant or fund has expired but has an active *STATUS*.

A grant title displayed in green indicates that the grant does not have a *PROJECT END DATE* defined.

A fund title displayed in green indicates that the fund does not have a *TERM DATE* defined.

> ★ A horizontal line may be displayed separating the grants (and funds) that are less than 90 days old.
>
> ★ The last refresh date is indicated at the bottom of the page.

Grant Summary

D1.   To review summary information about the grant, click the **grant number of interest**.   A new web window is initiated and the Grant Summary Report is displayed.
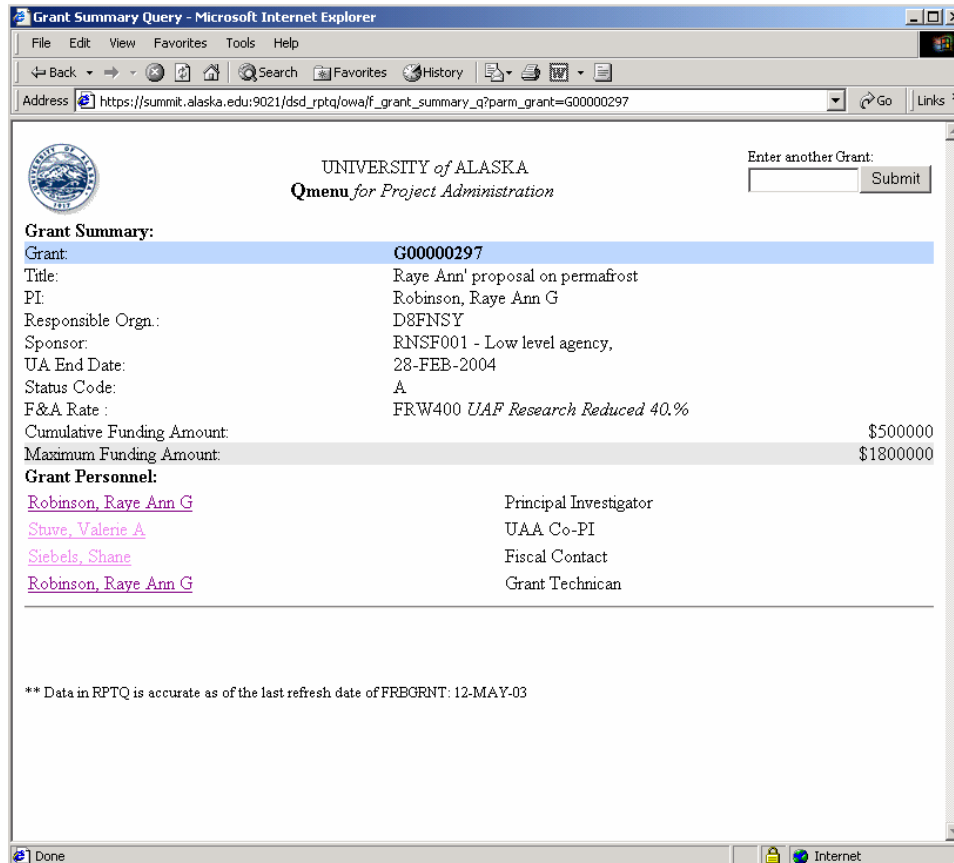

D2.   The name and title of the personnel assigned to the grant are listed at the bottom of the summary report.   To view details of the grants associated with one of the Grant Personnel, click on the **Grant Personnel name of interest**.

The original web window detailing the grants for the logged-in ID is updated with the information about the grants for the selected Grant Personnel.

See the Report Details section of this documentation for information about the data displayed.

Inception to Date Reporting

E1.   Once the Grants and Funds detail is displayed, inception to date (I2D) reporting can be viewed for a specific grant or fund.
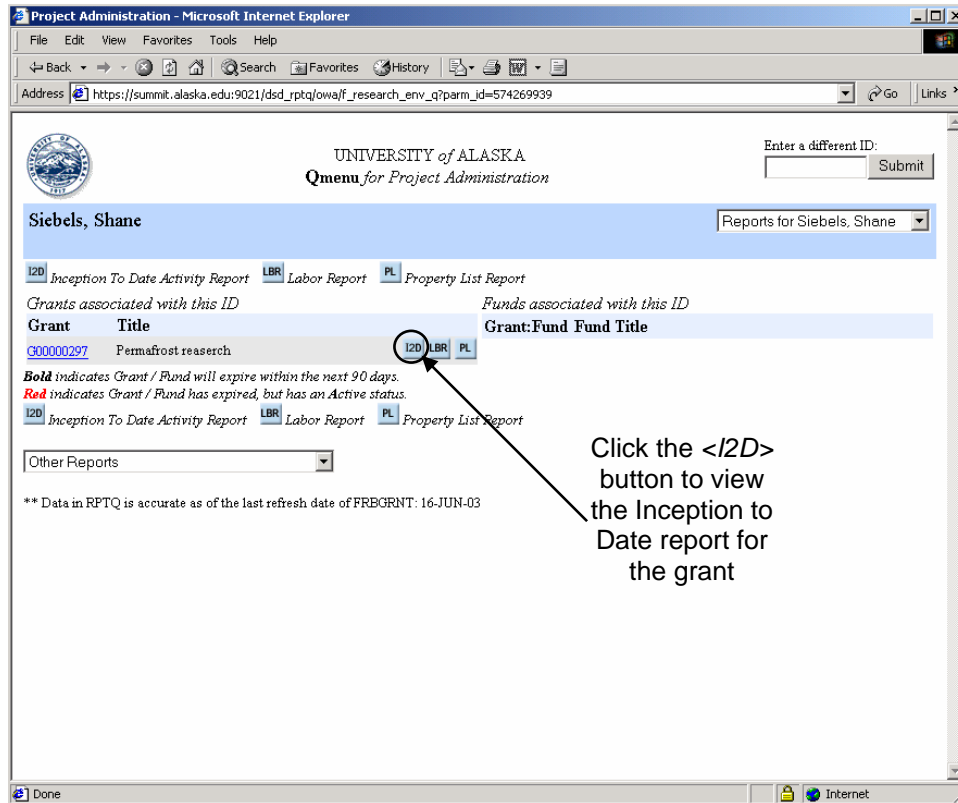
E2. Click the *<I2D>* button for the grant of interest. The Grant Budget Inception to Date report is displayed. This report lists all funds attached to the requested grant as well as a grant total summary.

> ★   The Grant Budget Inception to Date report is part of the QMenu library and can be run independently of Project Administration, if desired.
>
> ★   The inception to date report can be run for a specific grant or a specific fund.

Click a fund to view information for a specific fund code

Refresh date indicates how current the data is that is

Enter parameters of interest, if desired. The wildcard character (%) can be used

E3. Click a displayed fund code or enter any of the parameters listed at the bottom of the report for more information. If the wildcard character, **%**, is entered in the *ENTER FUND* field, all funds for the grant will be displayed.

E4. If the *ENTER ORGN* field is entered, information for the specified organization code(s) for a fund or the entire grant is displayed, depending on the requested fund parameter.

E5. The *SORT BY ORGN CODE* defaults to **FALSE**. To sort output by organization code, update to TRUE.

E6. To view the report without the heading information and the parameter information at the end of the report, update *PRINTER FRIENDLY* to **TRUE**.

E7. Once all parameters of interest are entered, click the *<Get Summaries for ALL Fund(s)>* button.

> ★ The last refresh date, which is displayed on every page, indicates how current the data is that is displayed.
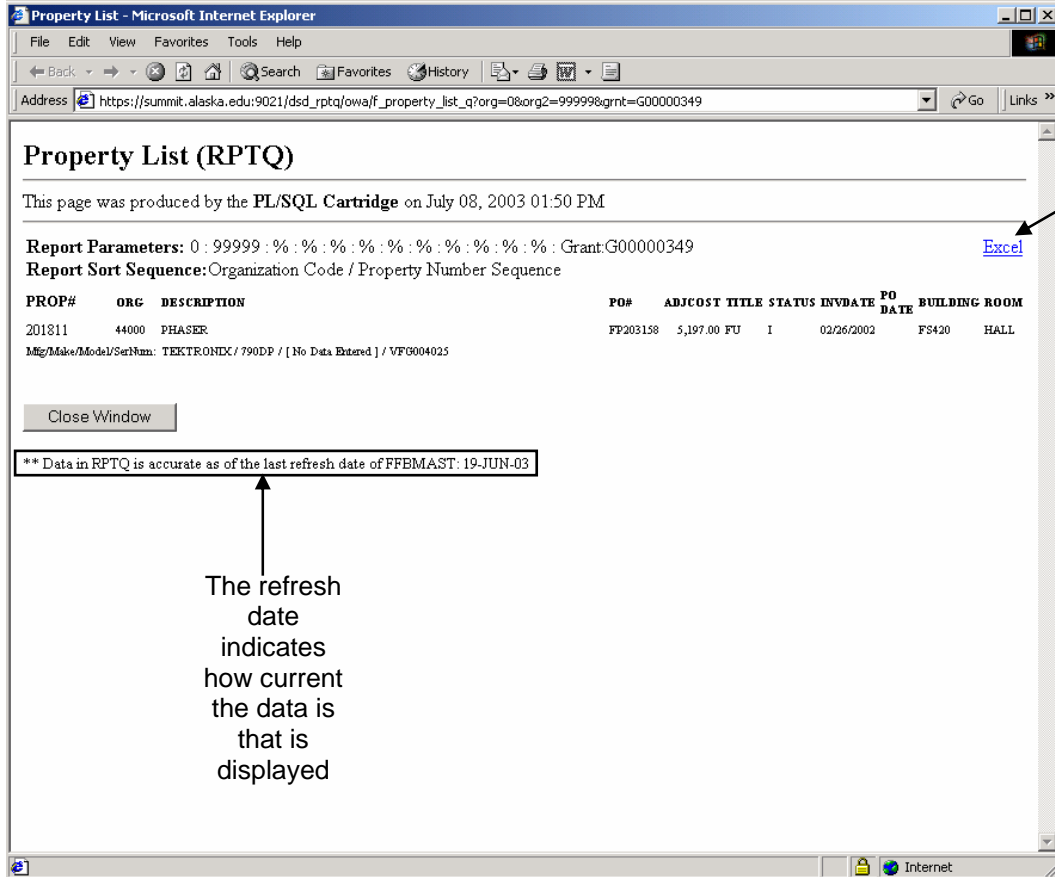
Property List Reporting

F1.   Once the Grants and Funds detail is displayed, property list (PL) reporting can be viewed for a specific grant.

Click the *<PL>* button to view the Property List report for the grant
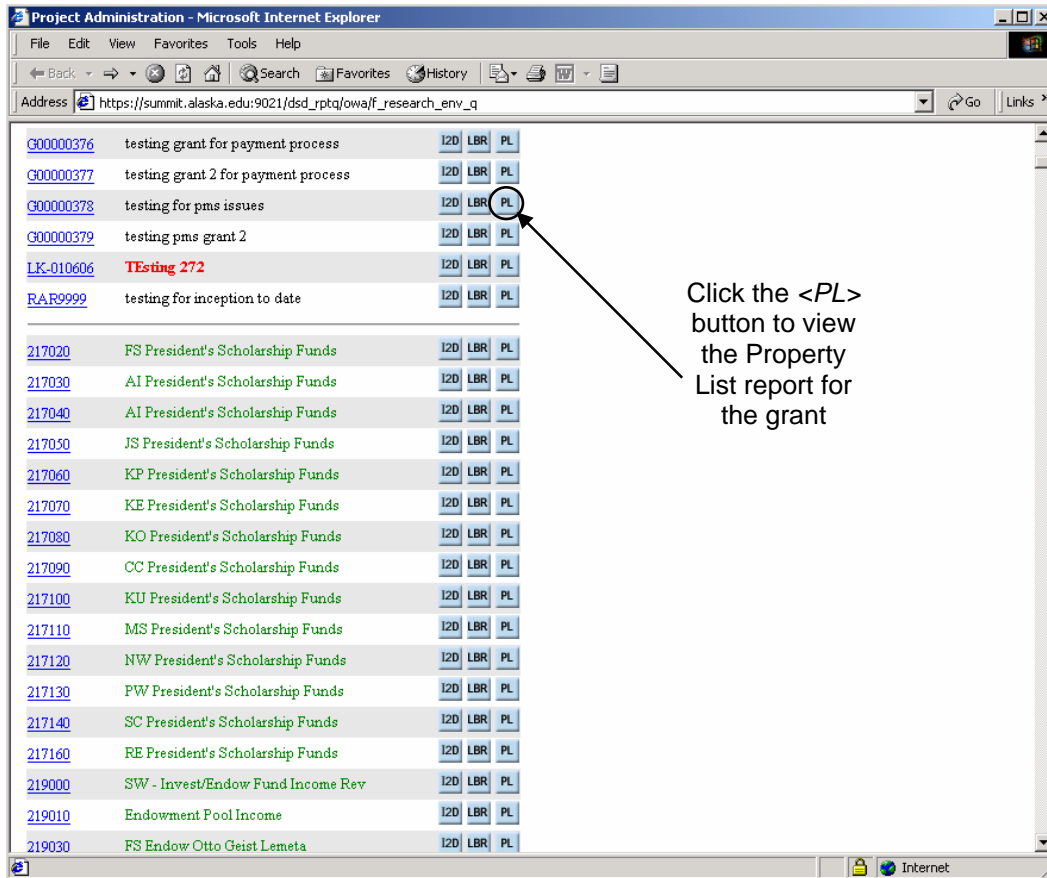
F2.   Click the *<PL>* button for the grant of interest. The Property List report is displayed. This report lists all property associated with the selected grant.
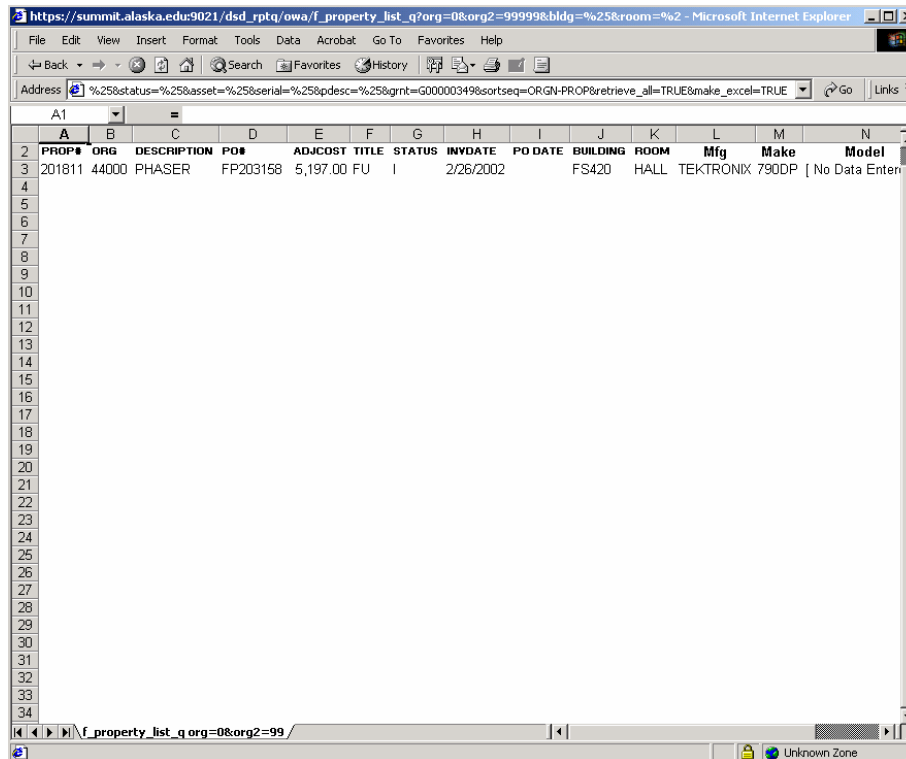
> ★   The Property List report is part of the QMenu library and can be run independently of Project Administration, if desired.

Click *<Excel>* to download the report into a Microsoft Excel spreadsheet.

The refresh date indicates how current the data is that is displayed

Download to Excel

G1.   The property list report can be downloaded to a Microsoft Excel spreadsheet.
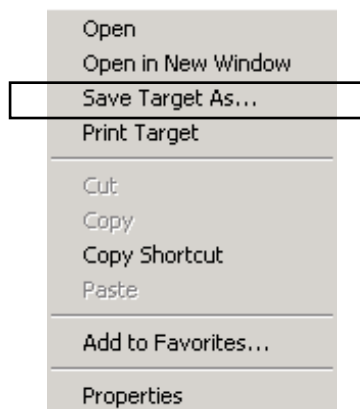
To view the spreadsheet click the *<Excel>* link displayed at the top right of the report. The spreadsheet is displayed in the web window. Continue with step G2.
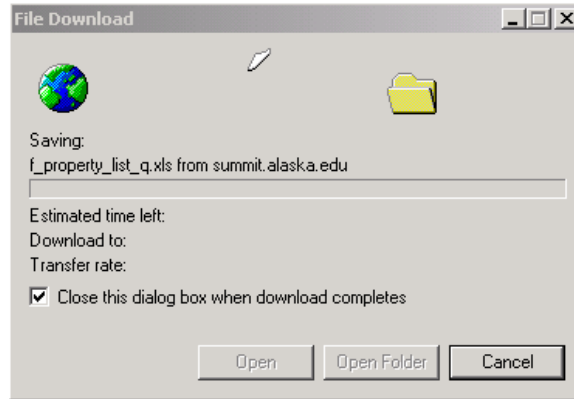

To download the file directly to Microsoft Excel, right-click on the *<Excel>* link displayed at the top right of the report. A popup menu is displayed.
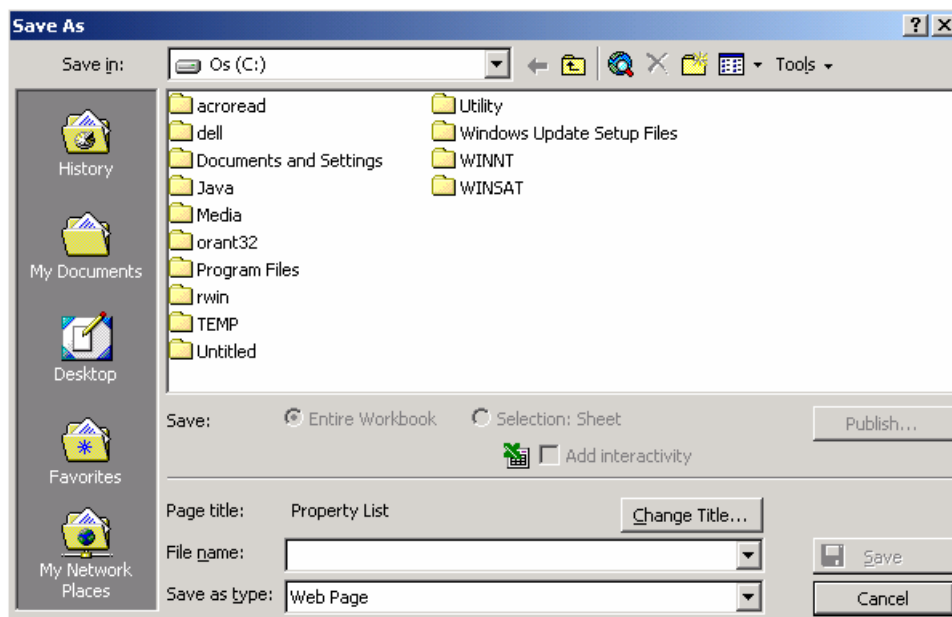

Click *<Save Target As…>*. A dialog box is displayed while the file is downloaded. Continue with step G3.

G2.   Once displayed in the web window, the report can be saved in Excel format. Click
   *<Save As>* from under the *<File>* menu.
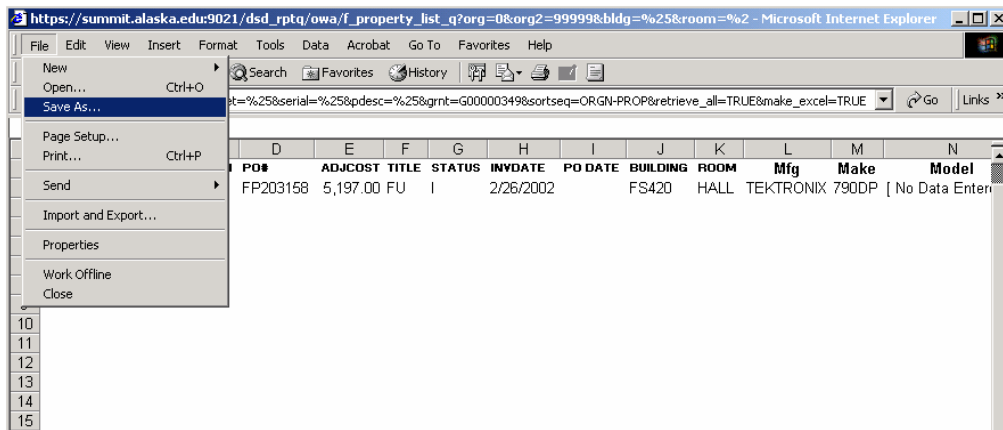
G3.   The Save As dialog box is displayed.

G4. First, choose where the file will be saved (i.e. path). Navigate to the directory of interest by double-clicking on a displayed folder or use the drop-down *SAVE IN* box to navigate.

G5. If the spreadsheet was viewed in the web window, choose **Microsoft Excel Workbook** from the *SAVE AS TYPE* drop down selection. Otherwise, the *SAVE AS TYPE* defaults to **Microsoft Excel Workbook**.
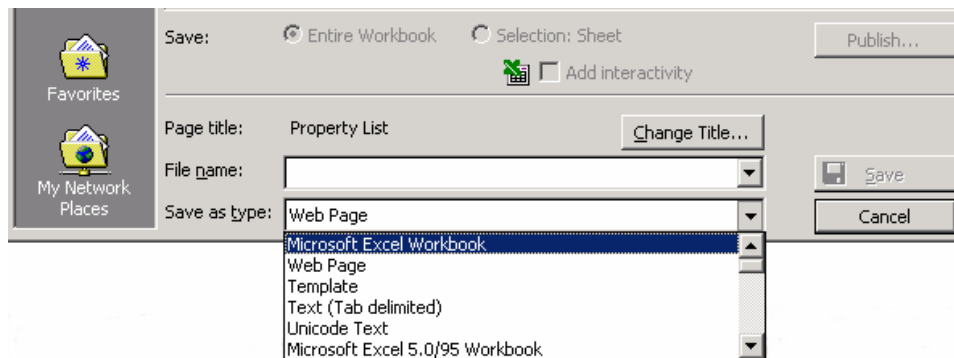
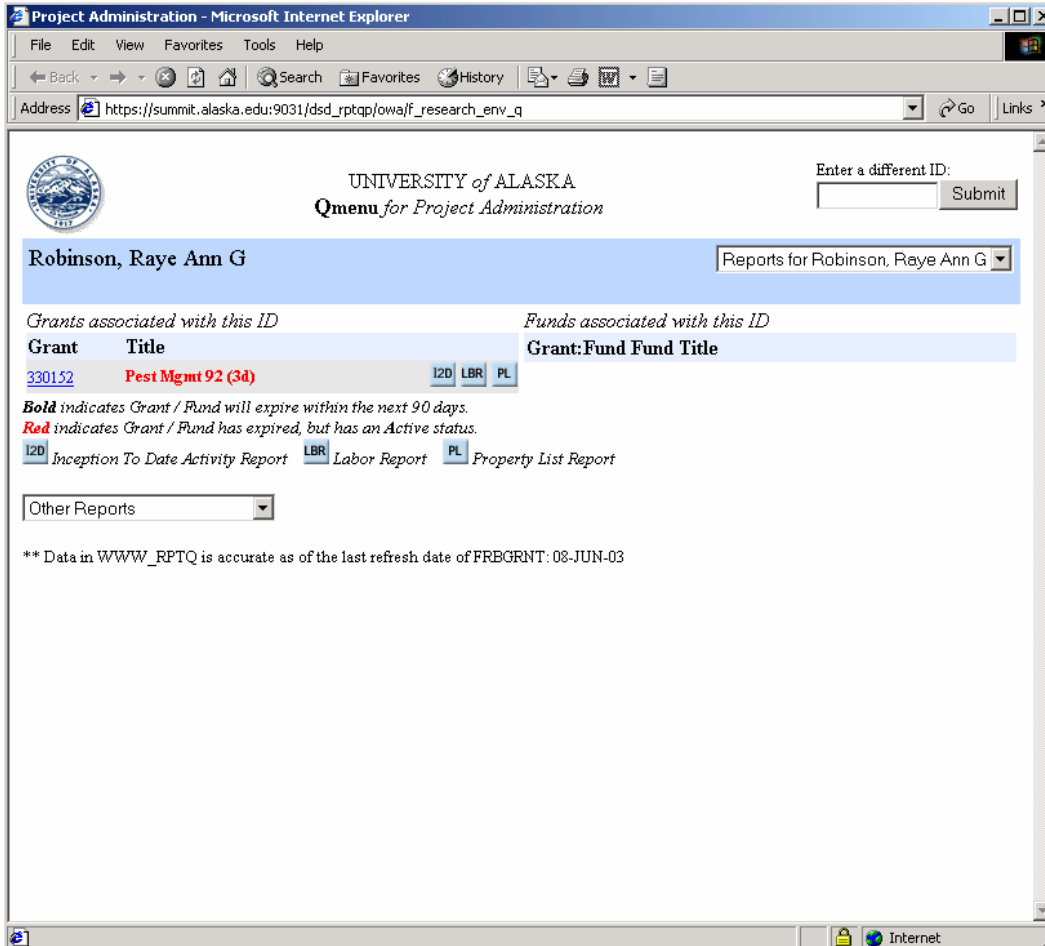Set the path in the *SAVE IN* field.
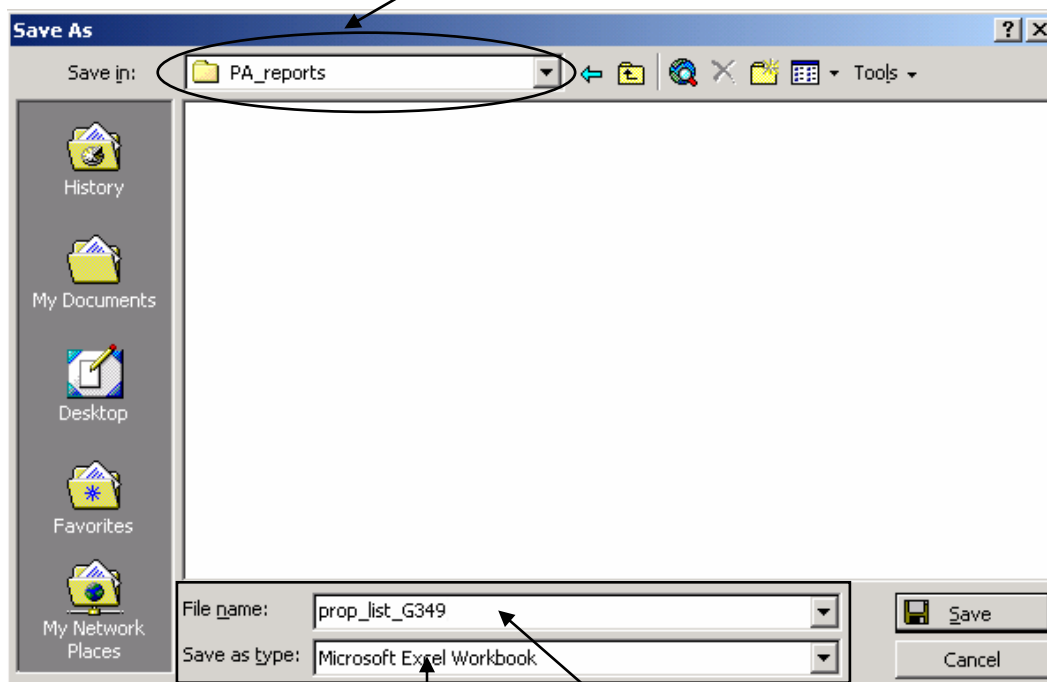
Update the *SAVE AS TYPE* to save as an excel spreadsheet.
Also name the file in the *FILE NAME* field.

G6. Type the name of the file in the *FILE NAME* field and click *<Save>*.

Labor Reporting

H1.   Once the Grants and Funds detail is displayed, labor (LBR) reporting can be viewed for a specific grant or fund.

H2.   Click the *<LBR>* button for the grant or fund of interest. The Labor Summary report is displayed in a separate web window.

Summary information is provided for each fund attached to the grant if the report was requested for a specific grant.

Labor Summary Query - Microsoft Internet Explorer				

Address https://summit.alaska.edu:9031/dsd_rptqp/owa/f_labor_summary_q?parm1=330152&parm2=08-JUL-03

UNIVERSITY *of* ALASKA
Qmenu *for Project Administration*

Enter a different **FROM** date: Enter a different **TO** date: Summarize by Payroll [Yes ▼]

[01-JAN-1970]   [08-JUL-03]   [Submit]

Labor Summary Report:
Grant: **330152** Detail in Excel

Fund: *330153* - Int Pest Management 93 Detail in Excel			Payroll	Hours	Amount
Fund Total				**0**	**.00**

Fund: *330156* - Int Pest Management (IPM) Detail in Excel			Payroll	Hours	Amount
Total for		Bettini, Lois A		546	12,055.12
Total for		Comeau, Mary J		305.5	6,449.85
Total for		Fastabend, Michael J		208	3,008.17
Total for		Hanzlik, Mark W		656	7,259.32
Total for		Kirby, Gabriel Charles		388	4,292.17
Total for		Moschetti, Rocco A		558	10,223.21
Total for		Omtzigt, Catharina Maria		648	7,171.17
Total for		Rose, Corlene M		688	7,568.76
Total for		Shannon, Elaine C		89	980.72
Total for		Vandre, Wayne G		0	.00
Total for		York, DeShana Dekerlegand		73.99	1,355.04
Fund Total				**4160.49**	**60,363.53**

| Grant Total for 330152 | | | 4160.49 hours | | $ 60,363.53 |

★ The social security numbers are also included on the labor summary and labor detail reports. They have been removed from this documentation for security purposes.

H3. For more labor details and drill down capability, accept the *SUMMARIZE BY PAYROLL* default of **Yes** and click the *<Submit>* button.

The web window is updated with detail information about the requested grant or fund. Detail information is provided for each fund attached to the grant if the report was requested for a specific grant.

If the labor report is requested for a specific grant, the report is broken down by fund.

Refresh date indicates how current the data is that is

If the labor report is requested for a specific grant, the report is broken down by fund and the total for the grant is displayed at the bottom of the report.

H4. The *ENTER A DIFFERENT FROM DATE* field defaults to **01-JAN-1970** and the *ENTER A DIFFERENT TO DATE* defaults to the **current date**.

To view the report for a different date range, update the *ENTER A DIFFERENT FROM DATE* and *ENTER A DIFFERENT TO DATE* fields to the **date range of interest** and click the *<Submit>* button.

> ★ Dates must be entered in the DD-MON-YYYY format (i.e. 31-MAY-2003) otherwise an error will be displayed.

H5. The *SUMMARIZE BY PAYROLL* defaults to **Yes** and will display report details with drill down capability whenever the *<Submit>* button is clicked. To display the report in summary format, update *SUMMARIZE BY PAYROLL* to **No** and click *<Submit>*.

Download to Excel

I1.   The labor report for the grant or the fund can be downloaded to a Microsoft Excel spreadsheet.

To view the spreadsheet click the *<Excel>* link displayed on the report.   The spreadsheet is displayed in the web window. Continue with step I2.


★   The social security numbers (*ID*) are also included on the labor summary and labor detail Excel spreadsheet.   They have been removed from this documentation for security purposes.

To download the file directly to Microsoft Excel, right-click on the *<Excel>* link displayed at the top right of the report. A popup menu is displayed.
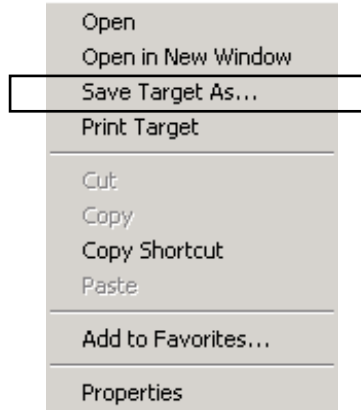
Click *<Save Target As…>*.   A dialog box is displayed while the file is downloaded.   Continue with step I3.
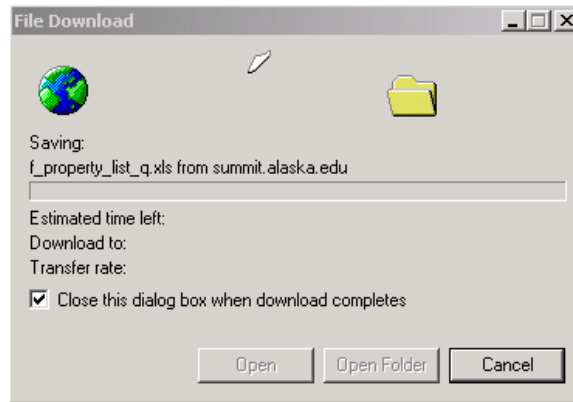
I2.   Once displayed in the web window, the report can be saved in Excel format. Click *<Save As>* from under the *<File>* menu.

I3.   The Save As dialog box is displayed.

I4.   First, choose where the file will be saved (i.e. path). Navigate to the directory of
       interest by double-clicking on a displayed folder or use the drop-down *SAVE IN*
       box to navigate.

I5.   If the spreadsheet was viewed in the web window, choose **Microsoft Excel
       Workbook** from the *SAVE AS TYPE* drop down selection. Otherwise, the *SAVE
       AS TYPE* defaults to **Microsoft Excel Workbook**.

Set the path in the *SAVE IN* field.

Update the *SAVE AS TYPE* to save as an excel spreadsheet.
Also name the file in the *FILE NAME* field.
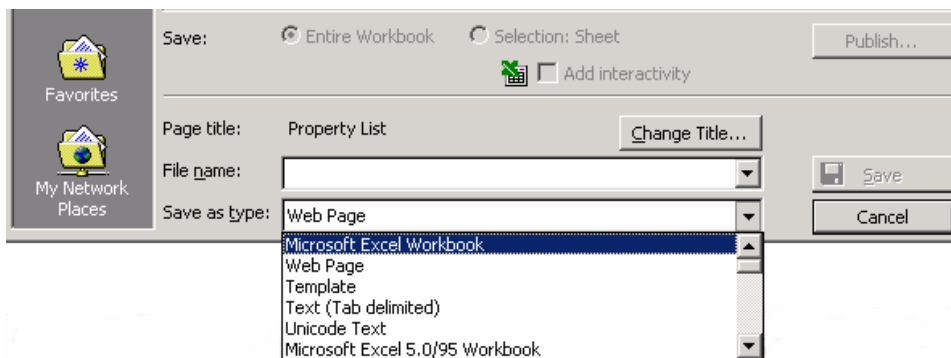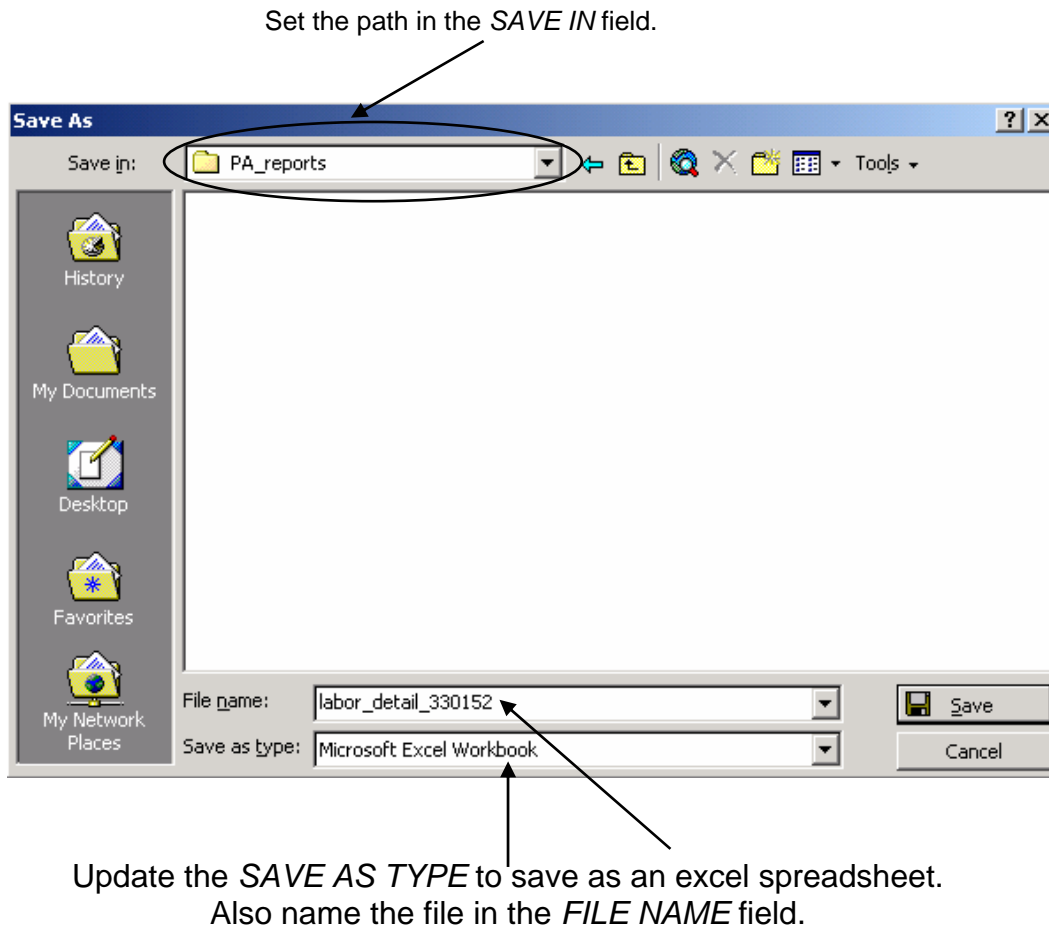
I6.   Type the **name of the file** in the *FILE NAME* field and click <Save>.

I7.   The web window which contains the spreadsheet can be closed by choosing
<*Close*> under the <*File*> menu or by clicking the **x** in the top right corner of the
window.

Other Report Features

J1. When Project Administration Reporting is selected, grant and fund information is displayed for the logged-in ID.

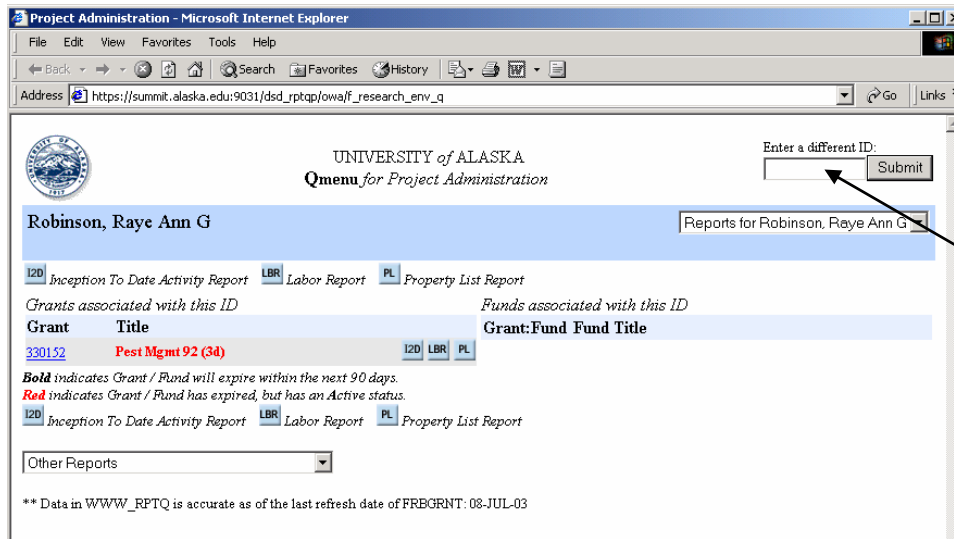To view project administration reporting for another id, enter the **ID of interest** in the *ENTER A DIFFERENT ID* field and click the <Submit> button.

Enter the ID of interest to view project administration data for another person

J2. To view other reports from the grant and fund information window, click on the down arrow next to the *REPORTS FOR XXX* drop down box, where **XXX** is the name of the person whose ID is currently displayed (Robinson, Raye Ann G in this example).
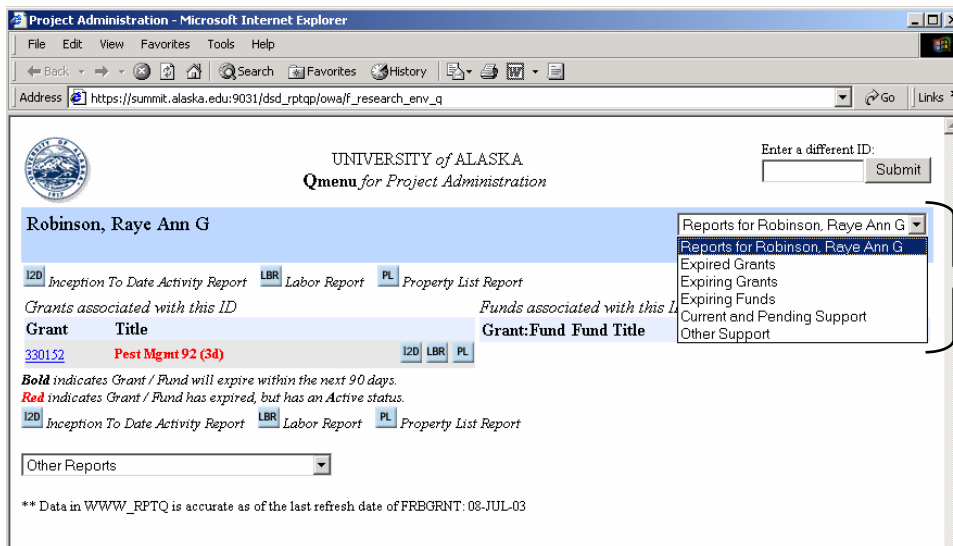
Click on the down arrow to view list of available reports

Expired Grants   Lists grants that are expiring this month, next month, or in two months. Also displays grants that have expired but have an active status.

Expiring Grants   Same as Expired Grants report but does not display grants that have expired but have an active status.

Expiring Funds   Lists funds that are expiring this month, next month, or in two months.

Current and Pending Support   Lists all committed support for the id of interest

Other Support   Lists all active, pending, and overlap support for the id of interest

> ★   With the exception of the Expired Grants report, the reports listed above are part of the QMenu library and can be run independently of Project Administration, if desired.

J3.   Once selected, the requested report will display in a separate web window.