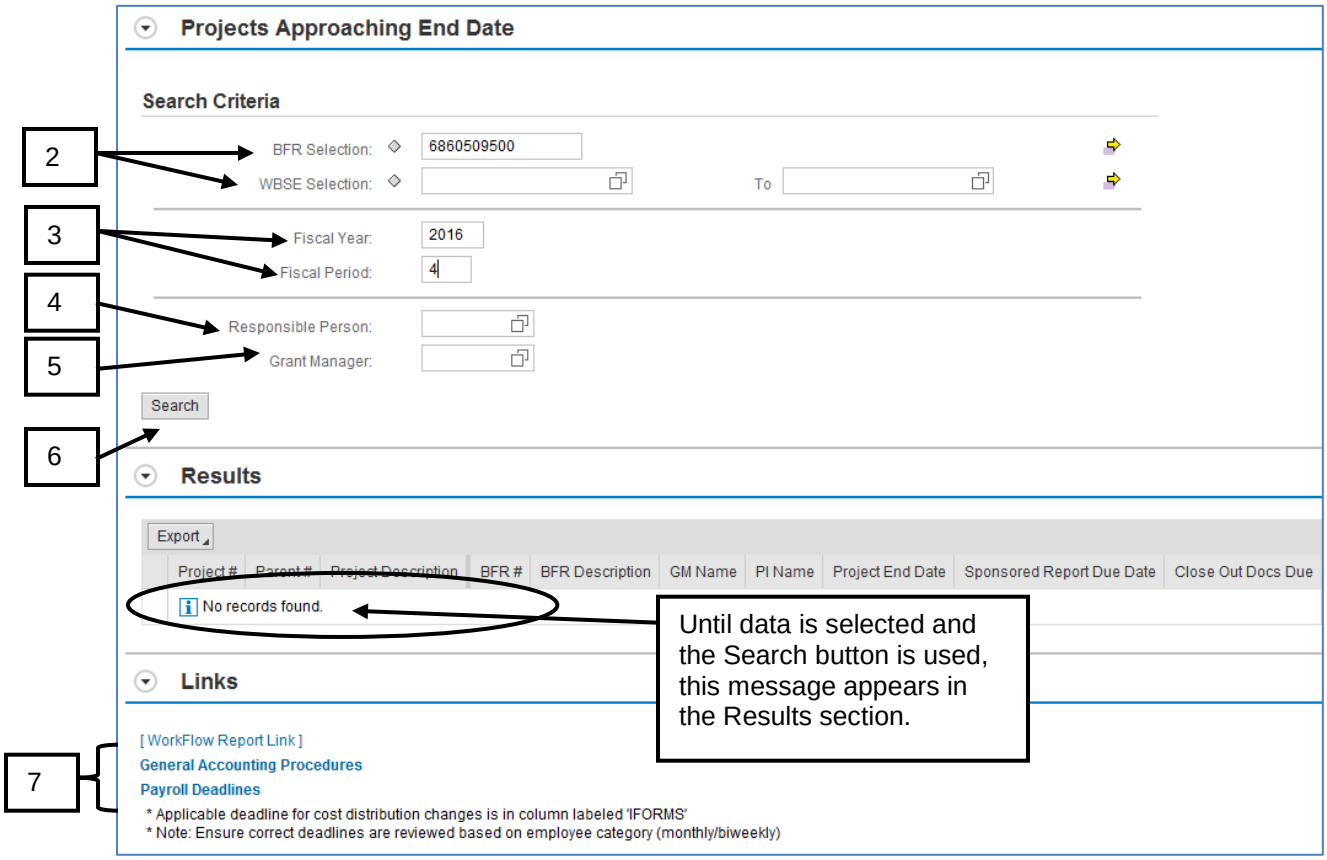
Projects Approaching End Date Report

Note: *This report is used to identify projects ending in the next three months. This report also allows for drilldown to the Project Obligations.*

1. From the *Sponsored Research Reports* page, click on the **Projects Approaching End Date Report** (underlined link) to display the report's selection screen.

On the *Projects Approaching End Date* page (note that the results will state no records found until data is selected):



2. *Required:* Enter a value(s) in ONE of the two fields:
   - Enter the desired **BFR code** (10 digits) in the first **BFR Selection** field to select all WBS Elements (project numbers) associated with that particular BFR code. ***OR***
   - Enter one or more **WBS Elements** (project numbers) in the **WBSE Selection** field (use **Multiple Selection** button to enter more than one 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.*

Projects Approaching End Date (cont.)

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

4. *Optional:* If entering a BFR code or multiple WBS Elements, enter a **personnel number** in the **Responsible Person** field to narrow the report to WBS Elements (projects) for that person.

   Note: If the number of the Responsible Person is unknown, click in the field and use the ***Drop-down*** *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.*

5. *Optional:* If entering a BFR code or multiple WBS Elements, enter a **personnel number** in the **Grant Manager** field to narrow the report to WBS Elements (projects) managed by that person.

   Note: If the number of the Grant Manager is unknown, click in the field and use the ***Drop-down*** *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.*

6. Click on the **Search** button to display the selected results in the section below.

   Note: The Results section will state that no records are found until the selection criteria is entered and the Search button is used.

7. Use the links at the bottom of the report for information as needed, including links to General Accounting Procedures (GAPs) as well as payroll deadlines, and a link to the Workflow Report.

Projects Approaching End Date (cont.)

In the *Projects Approaching End Date Results* section:

8

Results

Export

Project #	Parent #	Project Description	BFR #	BFR Description	GM Name	PI Name	Project End Date	Sponsored Report Due Date	Close Out Docs D
3834395	3834395	GATES INCIDENCE PARENT	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEORGIA D	11/01/2015	01/30/2016	12/31/2015
3834396	3834395	GATES INCIDENCE OBJECTIVE 1	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEORGIA D	11/01/2015	01/30/2016	12/31/2015
3834397	3834395	GATES INCIDENCE OBJECTIVE 2	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEORGIA D	11/01/2015	01/30/2016	12/31/2015
3834398	3834395	GATES/VRC	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEORGIA D	11/01/2015	01/30/2016	12/31/2015
3834399	3834395	GATES/MACFARLANE	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEORGIA D	11/01/2015	01/30/2016	12/31/2015

8. Review the **columns of data** displayed in the Results section and sorted by Project End Date, as follows:
   - **Project # -** lists the 7 digit WBS Element (WBSE) for the project.
   - **Parent #** - lists the 7 digit parent WBSE for the project.
   - **Project Description** - lists the Project name in SAP.
   - **BFR #** - the owning 10 digit BFR for the WBSE.
   - **BFR Description** - the name of the owning BFR.
   - **GM Name** - the name of the Grant Manager 1 listed in SAP.
   - **PI name** – the name of responsible person (Principal Investigator) in SAP.
   - **Project End Date** - the WBSE end date in SAP (the primary sort for results).
   - **Sponsor Report Due Date** - the date final reports are due to the sponsor.
   - **Closeout Docs Due Date** – the departmental due date for all closeout documents to be submitted to closeoutdocs@duke.edu.

Drill-Down Function to the Project Obligations Report

1

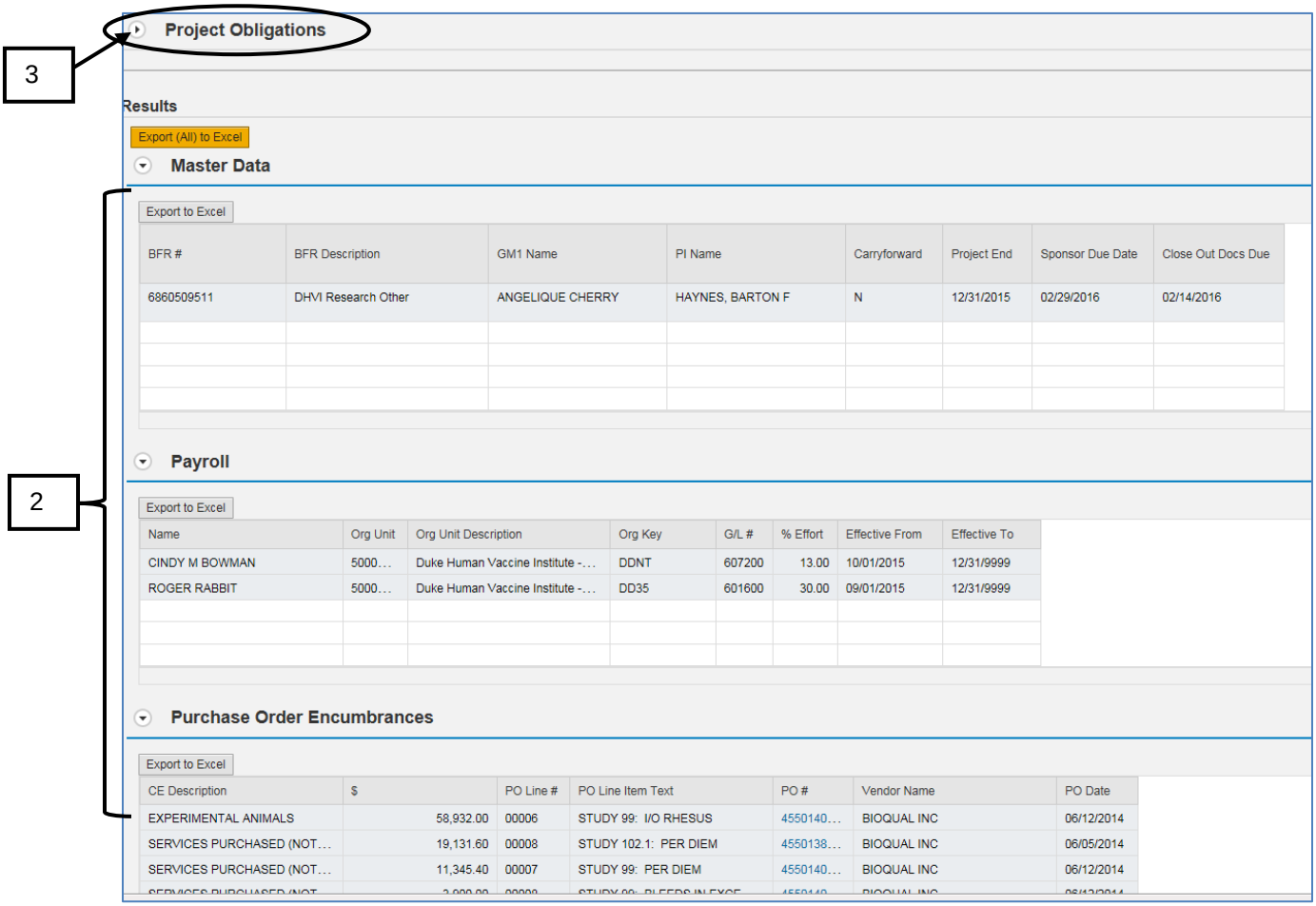
Results

Export

Project #	Parent #	Project Description	BFR #	BFR Description	GM Name	PI Name
3834395	3834395	GATES INCIDENCE PARENT	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEOF
3834396	3834395	GATES INCIDENCE OBJECTIVE 1	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEOF
3834397	3834395	GATES INCIDENCE OBJECTIVE 2	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEOF
3834398	3834395	GATES/VRC	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEOF
3834399	3834395	GATES/MACFARLANE	6860509511	DHVI Research Other	ALICIA HARTSFIELD	TOMARAS, GEOF

1. To drill-down to display the Project Obligations Report for a project, click on **ONE** of the underlined 7 digit links as outlined below:
   - Click on the underlined Project # link to display the Project Obligations Report and return information for the one Project # selected.
   - Click on the underlined Parent # link to display the Project Obligations Report return information for all Projects associated with that Parent #.

Projects Approaching End Date (cont.)



2. Review the data in the Project Obligations Report which opens in a separate window and identifies payroll and purchase order commitments (i.e., encumbrances) still showing on the WBSE / Project - refer to the **Project Obligations Report** section of this guide for more details about this report.

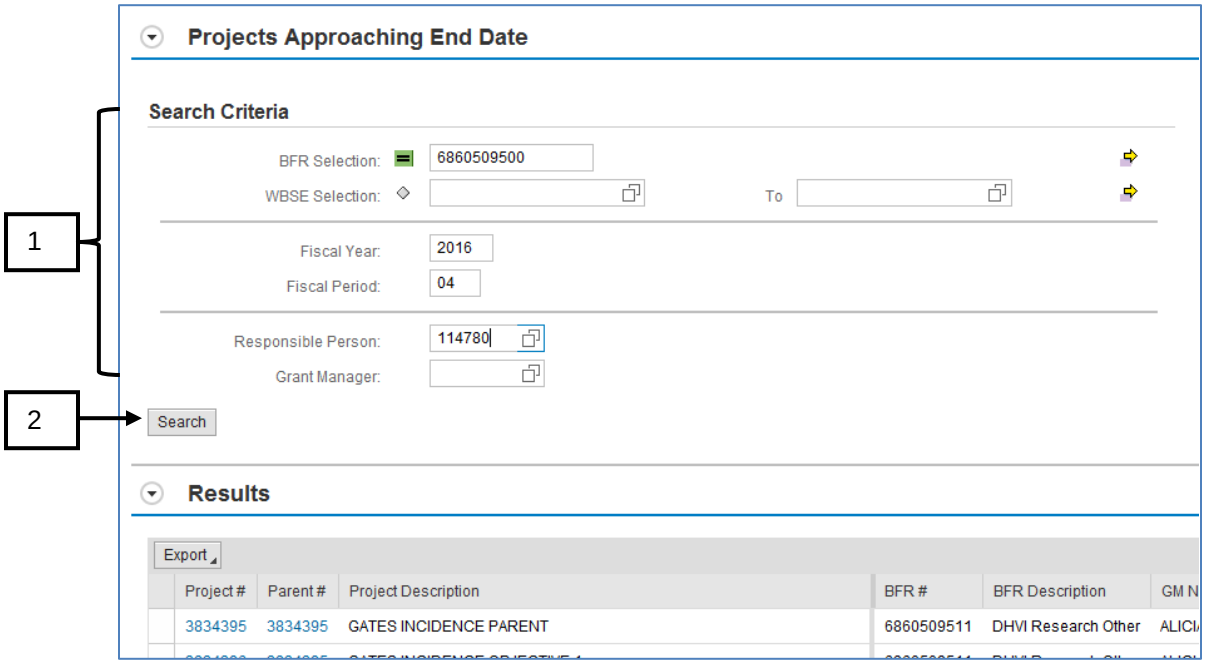
3. To see selection criteria fields at the top of the report and use those fields to select other projects, click on the **Twistee** icon (small arrow) next to Project Obligations and refer to **Project Obligations Report** section of this guide.

   Note: When the Project Obligations Report is accessed from the drill-down function of the Projects Approaching End Date Report, the Project Obligations table showing the selection fields at the top of the report is collapsed. To expand the tray to show the selection criteria, click on the Twistee icon (small arrow) next to Project Obligations.

4. When done, close the Project Obligations Report (the Projects Approaching End Date is still open in another window).

Projects Approaching End Date (cont.)

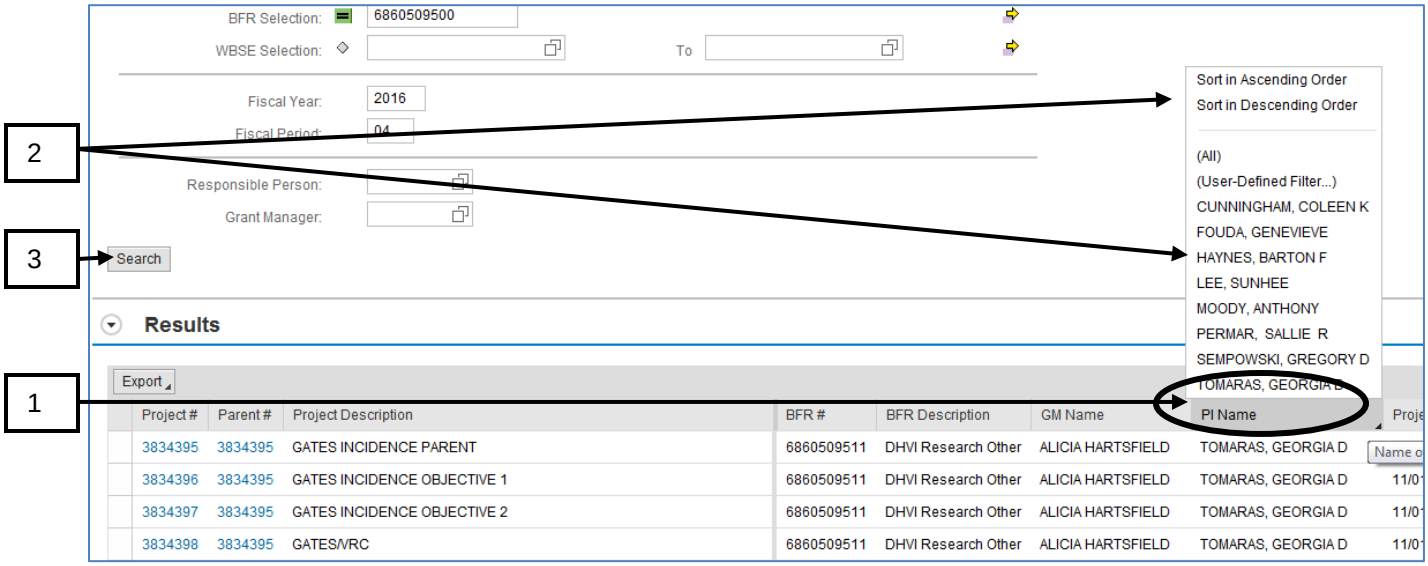
Updating Results with New Selection Criteria



1. To update the Projects Approaching End Date report while keeping some of the selection criteria the same, simply change any of the selection values in the fields at the top of the report:
   - Change the BFR or WBSE selection
   - Change the Fiscal Year or Fiscal Period
   - Change the Responsible Person or Grant Manager
2. Once the selection values are updated, click on the **Search** button to re-populate the Results section of the screen and review the data.

Projects Approaching End Date (cont.)

Sorting and Filtering the Results

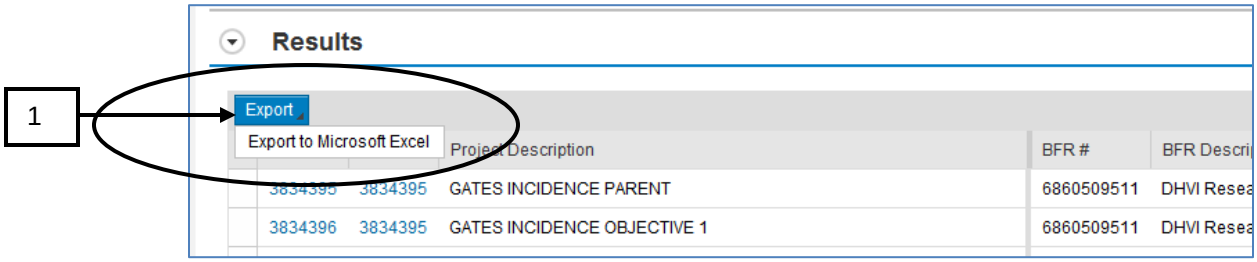


1. To sort or filter by a column, first click on a desired column heading.
2. In the resulting pop-out box, choose the desired option such as Sort Ascending or a value to use from the list as the filter.
3. Click on the **Search** button to display the selected results.

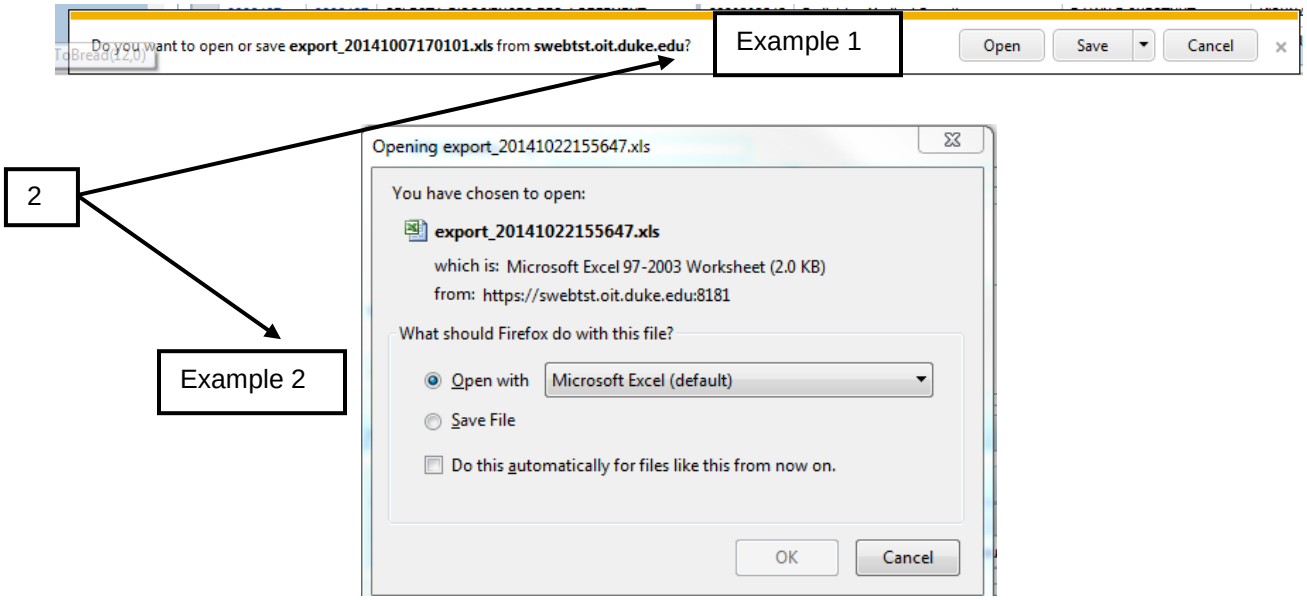
Note: To remove a filter and reset the results, repeat the steps above and choose the value of (All).

Projects Approaching End Date (cont.)

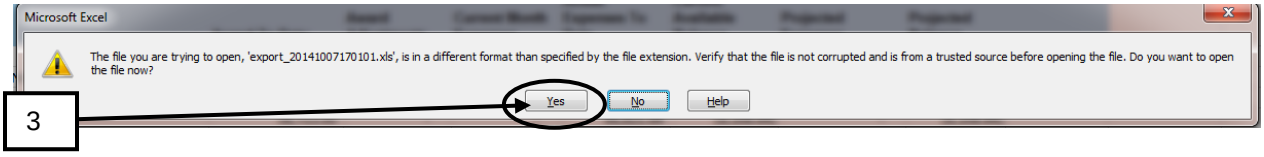
Exporting the Results



1. To export the results to Excel, click on the **Export** button and click on the resulting drop-down option of **Export to Microsoft Excel**.



2. Depending on your browser, you will be prompted to Open, Save or Cancel the download– choose the "**Open**" option unless another option is desired.
   - Example 1 above = Download prompt in Internet Explorer.
   - Example 2 above = Download prompt in Firefox.



3. Excel will open and the data will be exported (the above prompt may appear and if so, click **Yes** button to open the file).