THE UNIVERSITY *of* NEW MEXICO

Finance Systems Management

Date: 10/24/2016

FRGGR90 Closeout Workflow for Funds Ending on Contracts and Grants

The following steps will outline the procedure for running Report FRGGR90 – Closeout Workflow for Funds Ending on Contracts and Grants.

1. To open the report dashboard, double-click on FRGGR90 – Closeout Workflow for Funds Ending on Contracts and Grants in the F All Campus Reports folder.

2. Select columns to display on your report. Use the left and right arrows to move the columns to the box on the right – those columns will display on your report output. You can also change the order of the columns using the up and down arrows.

3. Report results will be for all of HSC or Main Campus (depending on your selection), so it is important to select a column to filter on - such as Org Code, PI, etc. After you have selected columns, your screen should resemble the below image. Next, select your Campus by choosing the radio button next to either HSC or Main.
    Note: it is advised that you select Stage Name and Aging for the report output. Stage Name will display the current workflow status (e.g. Waiting for Department to Extend or Close) and Aging will display the number of days since the grant end date.

4. Choose the Stages from the bottom list. The default is set to ALL, which returns information on all of the open awards in workflow. This will allow you to see the current status of all open awards. However, you can narrow this down further if you are interested in a specific stage or stages.

5. After you have selected the Stage(s) for the report, choose the display output. HTML Active Report and Excel are the output options – because this report prints for the entire HSC or Main Campus, you will be able to perform some post-processing filters using either of these. However, **please note that HTML Active Report should not be used for printing. If using HTML Active Report, please export to Excel *before* printing your results to ensure that they are formatted to your liking.** This process will be covered later in this Job Aid.

6. Please note the Save icon at the bottom of the screen. Once you've set up your report, you can use this button to save your selections so that you do not have to choose the columns, stages, etc. the next time you run the report. Click the Save icon to save your report setup.
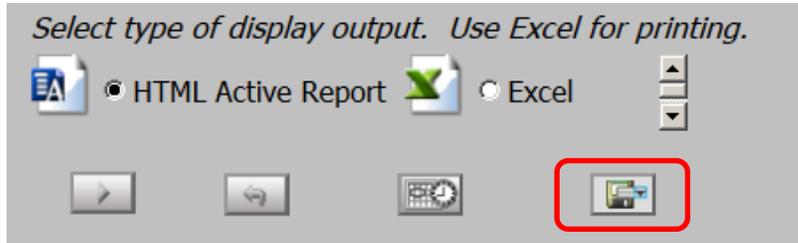
7. This will open the save dialog screen. Be sure to click on your MyContent folder to save the file.
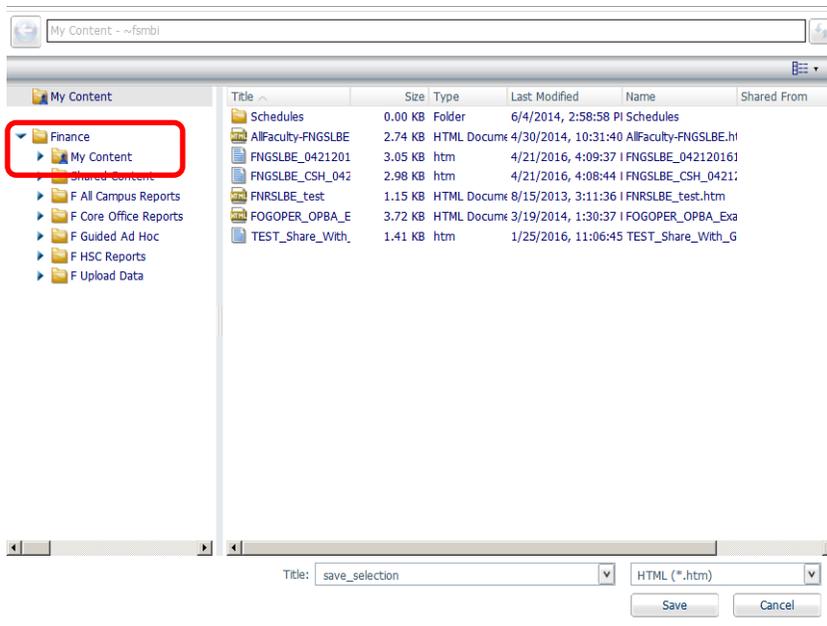
8. Give the report a name that is meaningful to you and save it. The next time you need to run this report, you can run the saved file directly from your MyContent folder.
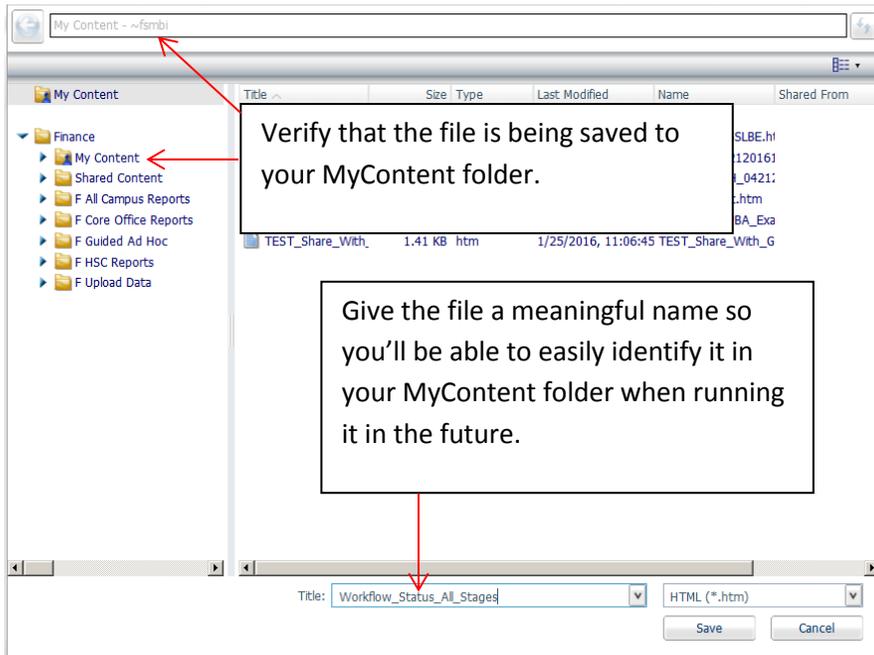
9. After saving selections, you will be returned to the report dashboard. Click on the Run button at the bottom left.
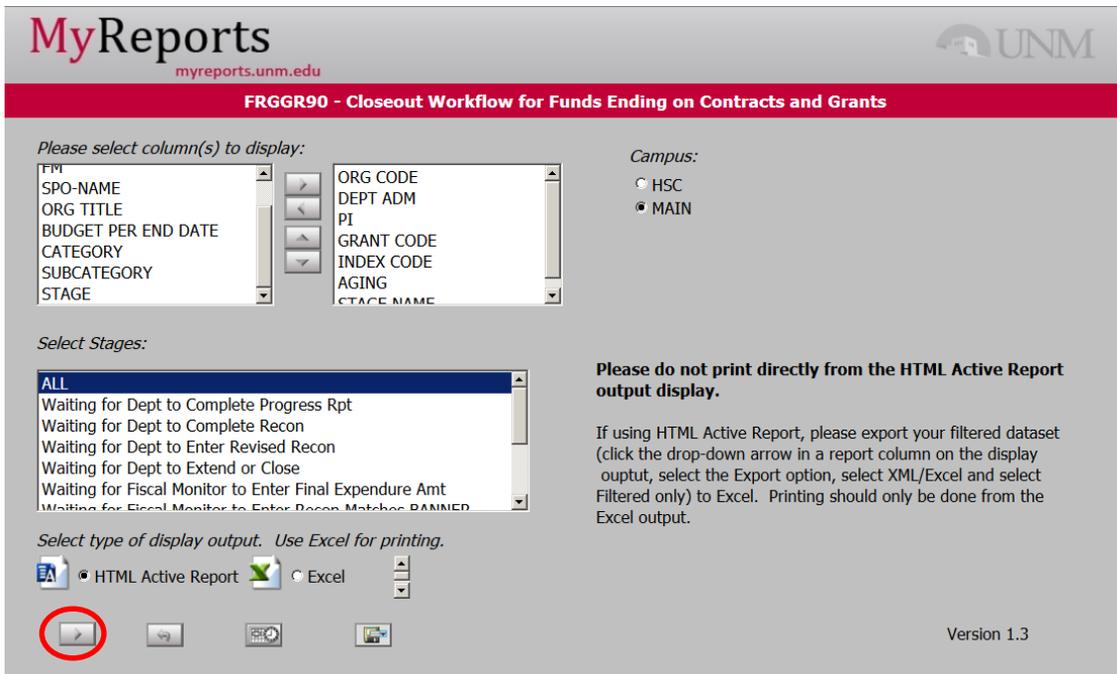
10. Because HTML Active Report allows for easy filtering, this output can be used to retrieve the full result set, then to narrow down the results to your specific area/PI for export.

When running the report, you will see output for the entire campus; notice that there are drop-down arrows next to each column header.
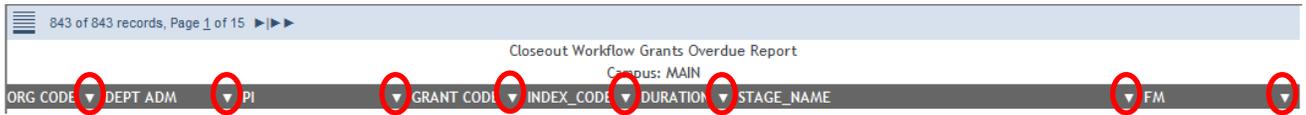
11. Click on a drop-down arrow next to a column that you want to filter. For example, clicking the drop-down next to Org Code will bring up the following list. Hover over Filter, then select Equals.

12. This will take you to a Filter Selection screen similar to the one below. There are times when you may need to type your values into the box, however in most cases, you will be able to click the drop-down arrow next to the empty box and bring up a list of choices (e.g. when filtering Org Code, a list of orgs will be displayed). When using the drop-down arrow list, simply choose your orgs from the list, then hit the Filter button. This will narrow down the results based on your selections. Please also note that you can move the "Filter Selection" box by clicking the top (blue Filter Selection area), dragging, and dropping.

13. You can filter your results on any column. Once you have the results that you want, you can export the results to Excel for saving and/or printing. Click the drop-down arrow on any column, hover over Export, then XML (Excel), then choose Filtered only.

Closeout Workflow Grants Overdue Report
Campus: MAIN

RG CODE ▼ DEPT ADM ▼ PI ▼ GRANT CODE ▼ INDEX_CODE ▼ DURATION ▼ STAGE_NAME ▼ FM ▼

Sort Ascending
Sort Descending

Filter ►
Calculate ►
Chart ►
Rollup ►
Pivot (Cross Tab) ►

Hide Column
Freeze Column
Unfreeze All
Grid Tool
Chart/Rollup Tool
Pivot Tool

Show Records ►
Comments ►
Send as E-mail
Save Changes
Export
Print   HTML ►
Window   CSV (comma delim) ►
Restore Original   XML (Excel)   All records
                                 Filtered only

14. If you get a warning message, click Ok to allow ActiveX to run. (Whether or not you receive this warning depends on the ActiveX controls settings in your web browser).

15. The filtered results will be written to an Excel spreadsheet. From here, you can save the worksheet, or format it for printing. As a reminder, please note that printing should only be done from Excel; please do not print directly from the ActiveHTML output.

END