

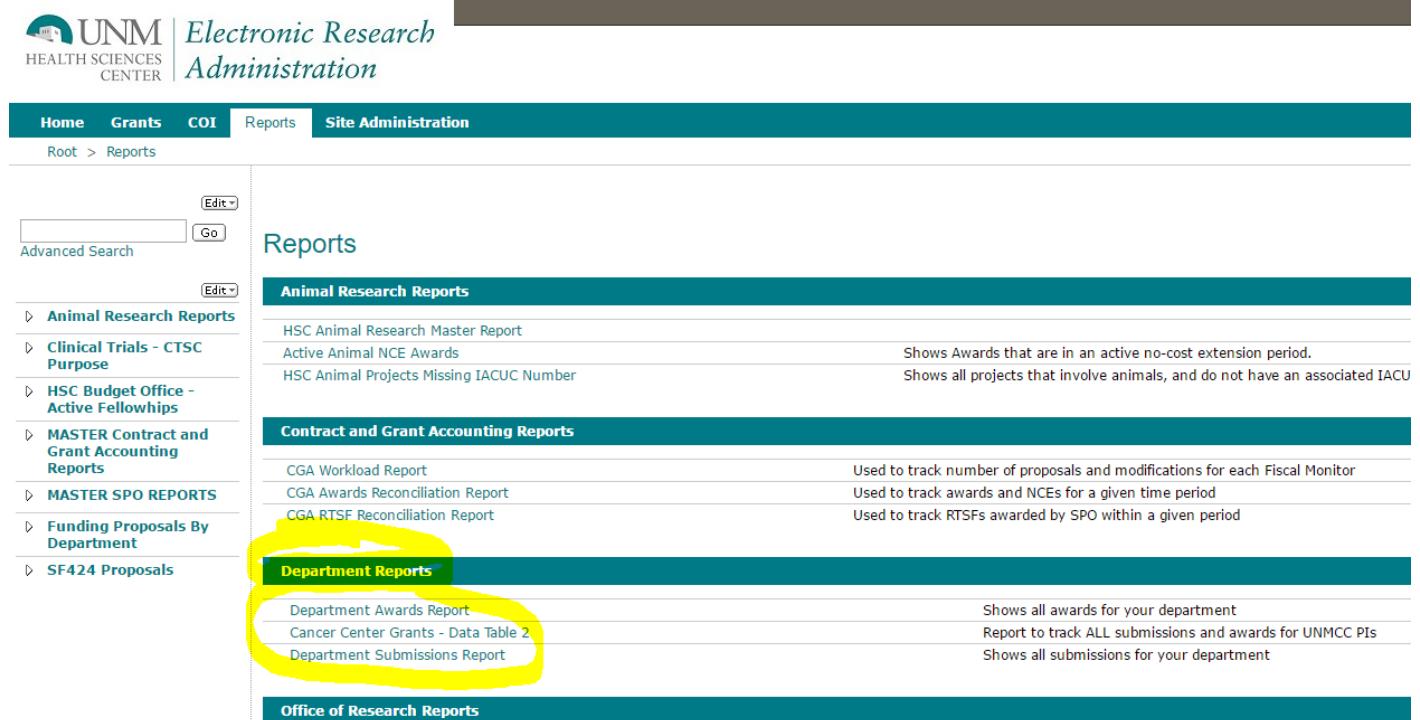
How to Run a Department Report in Click

Log in to Click using your HSC Credentials. You will click on the “Reports” tab.



The screenshot shows the UNM Health Sciences Center Electronic Research Administration homepage. At the top, there's a navigation bar with links for Home, Grants, COI, Reports (which is highlighted with a yellow oval), and Site Administration. Below the navigation bar, the URL is shown as Root > Home. On the left side, there's a sidebar with a 'Contact Us' link. The main content area has a section titled 'Important Information for First-Time Users' which includes a note about using the username and password. Below this is a section titled 'eResearch Portal: Grants and Contracts' with a note about it being an electronic gateway for submissions, review, approval, and tracking. A 'Folders' section lists 'Clinical Trials at Green Fields Clinic', 'Contact Us', and 'Help Using This Site'.

Next, you will look for the “Department Reports” section. The two reports you will be able to utilize are the Department Awards Report and the Department Submissions Report. Click on the link of the report you would like to run.



The screenshot shows the 'Reports' page within the UNM Electronic Research Administration system. At the top, there's a search bar with 'Advanced Search' and 'Go' buttons. The main content area is titled 'Reports' and contains three sections: 'Animal Research Reports', 'Contract and Grant Accounting Reports', and 'Department Reports'. The 'Department Reports' section is highlighted with a yellow oval. It lists three reports: 'Department Awards Report', 'Cancer Center Grants - Data Table 2', and 'Department Submissions Report'. To the right of each report, there's a brief description of what it shows. At the bottom, there's a footer for 'Office of Research Reports'.

If you are running a report for the first time during the day, the query section might take a moment to appear. Once available, you will select your “Department Name” and the Awarded Date Parameters. Please note, the date parameters ARE NOT your budget start and end dates. This date is the day SPO awarded the project and forwarded to C&GA. Examples of queries:

- To see all FY17 Awards YTD: Enter 7/1/16 in the “Awarded Start Date” field and leave the “Awarded End Date” field with the “null” checkbox marked. The query means it will pick up all projects awarded on or after 7/1/16 up until the date, they were awarded.
- To see all FY16 Awards: Enter 7/1/15 in the “Awarded Start Date” field and 6/30/16 in the “Awarded End Date” field.
- To see all projects awarded up to FY15: Leave the “null” checkbox marked and enter 6/30/15 in the “Awarded End Date” field. This will show all awards up to FY15 end.

The value provided for the report parameter 'AwardedDateStart' is not valid for its type. (rsReportParameterTypeMismatch)

Awards Report for VP Health Sciences Office

Principal Investigator	PI Banner Org	Project Number	Primary Sponsor	Project Title	Award Number	Proposal Type	Instrument Type	Start Date	End Date	D
Loretta Doyle	UNMMG	FP00002946	Gila Regional Medical Center	Professional Services	LTA-17-05	Funding Submission	Contract	11/1/2016	10/31/2017	

For a submissions report, you would use the same method as above; however, the query dates used in the submission report are the dates that the project was created in Click. i.e., you created a Click record on 3/31/17; this is the “Created Date Start/End” date.

The value provided for the report parameter 'CreatedDateStart' is not valid for its type. (rsReportParameterTypeMismatch)

Once you have the query, you will click on View Full Report. You are also able to export this data into multiple formats for your use:

Note: If you need a PDF, best is to export to Excel then save as PDF. The other export options have trouble identifying the margins.

The value provided for the report parameter 'CreatedDateStart' is not valid for its type. (rsReportParameterTypeMismatch)

Principal Investigator	Project Number	PI Banner Org	Submitting Department
Amber Alfaro	FP00002970	UNMMG	VP Health Sciences Office