

3.0. Project Creation on Enterprise Resource Planning (ERP)/ E-Business

3.1. Project Creation

- Step 3.1.1: Go to portal home page <http://portal.kfupm.edu.sa> as shown in Figure 10 below.



Figure 10: Portal Login Page

- Step 3.1.2: Login into the Portal (above) using your KFUPM User Name and Password
- Step 3.1.3: Click on “eBusiness”, highlighted in red in Figure 11 below.

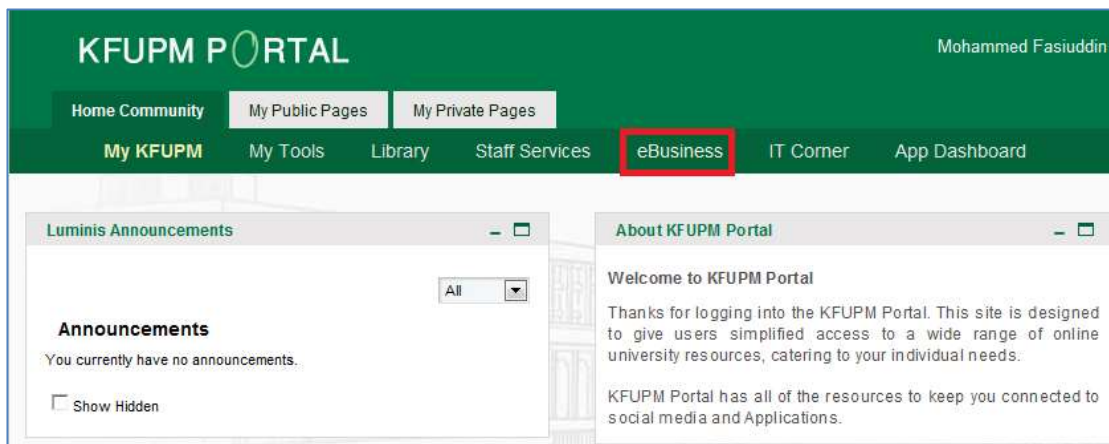


Figure 11: Link to E-Business from the Portal Web page

- Step 3.1.4: Login into E-Business, if necessary, with the E-Business User name and Password provided by ITC, as shown in Figure 12.



Figure 12: E-Business Login Page

- Step 3.1.5: Click on the “KFUPM Project Manager, DSR” responsibility, highlighted in red in Figure 13 below, for:
 - Creating a newly approved project or completing an unfinished submission (first part discussed here in this section)
 - Creating a project’s approved budget

Caution: Please note, if the “KFUPM Project Manager, DSR” responsibility is not available in your e-business; please contact src@kfupm.edu.sa for having it added to your account.

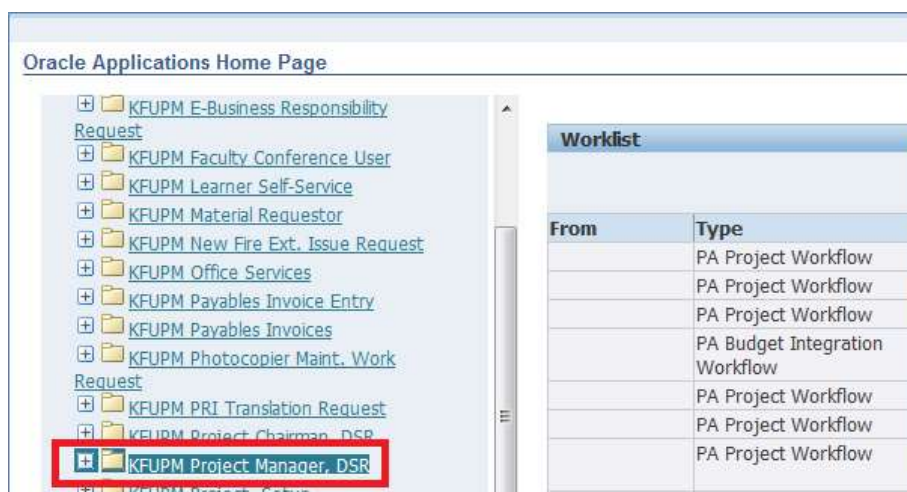


Figure 13: Link to KFUPM Project Manager, DSR responsibility to create projects and budgets

- Step 3.1.6: To start creating a new project or to complete an unfinished submission, click on “**Projects**” available under KFUPM Project Manager, DSR responsibility as highlighted in Figure 14 below.



Figure 14: Link to start creating new project(s) or complete unfinished submissions

Caution: When the application starts, a security-warning dialog may pop-up as shown Figure 15. You will need to check the box “I accept the risk and want to run this application” and click on “Run” to continue. Please note, popup blockers installed on your system may prevent the Java application from opening. As such, you may need to disable or uninstall such applications.

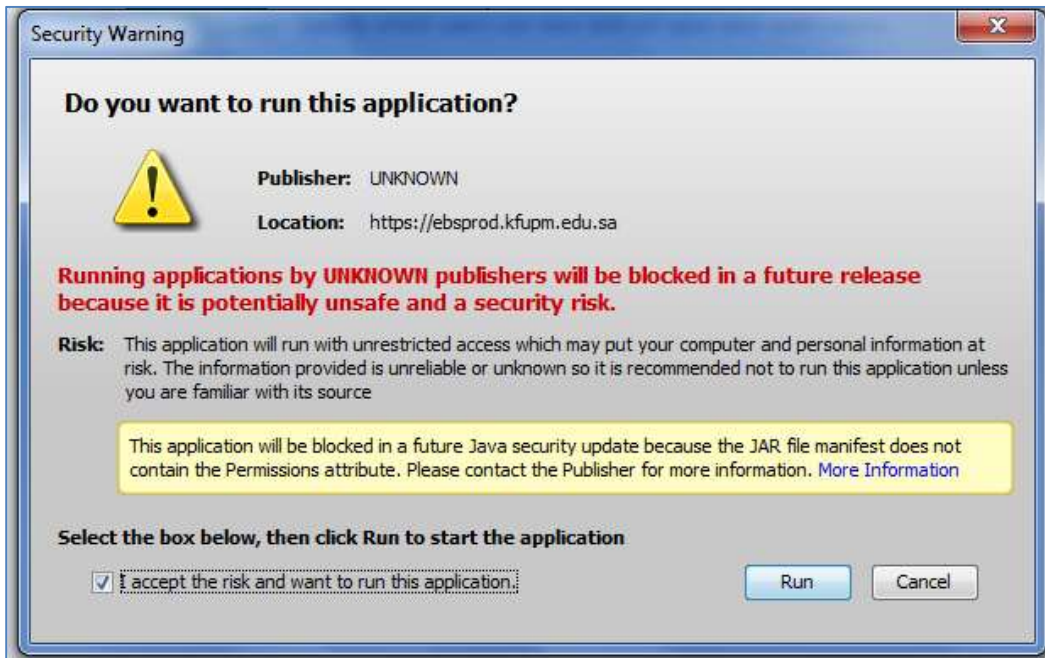


Figure 15: Security warning window when launching the Java application

- Step 3.1.7: To start creating a new project, select “**Templates**” from the “Search For” field, highlighted by the red box in Figure 16.
- Step 3.1.8: Select the Type of grant (e.g. SABIC, Fast Track, Internal, Book Writing, Sabbatical, Junior faculty, Book Translation) from the field “Type”, highlighted by the green box.
- Step 3.1.9: Click on the Find button, highlighted by the blue box

Caution: Please note, to complete unfinished submissions, in Step 3.1.7, Select **“Projects”**, shown in the red box, and enter the assigned project Number and search for the project by clicking Find, highlighted by the blue box, and then skip to Step 3.1.21.

The screenshot shows a 'Find Projects' window with several input fields. The 'Search For' dropdown is open, showing 'Templates' (selected), 'Projects', and 'Projects, Templates'. The 'Type' field is highlighted with a green box. The 'Find' button is highlighted with a blue box.

Figure 16: Overview of Java Form to Create and Search Projects

- Step 3.1.10: Corresponding project template will open in a new form as shown in Figure 17. Click on **“Copy To”**, highlighted by the red box. Another new form “Project Quick Entry” opens, as shown in Figure 18.

The screenshot shows a 'Projects, Templates Summary' window with a table. The table has columns: Operating Unit, Number, Name, Project Type, Description, and Status. The first row is highlighted with a blue box. The 'Copy To...' button is highlighted with a red box.

Operating Unit	Number	Name	Project Type	Description	Status
King Fahd University of Pet	T, SABIC Temp	T, SABIC Template	SABIC		Proposal

Figure 17: An Overview of Projects, Template Summary Form: SABIC Template for example

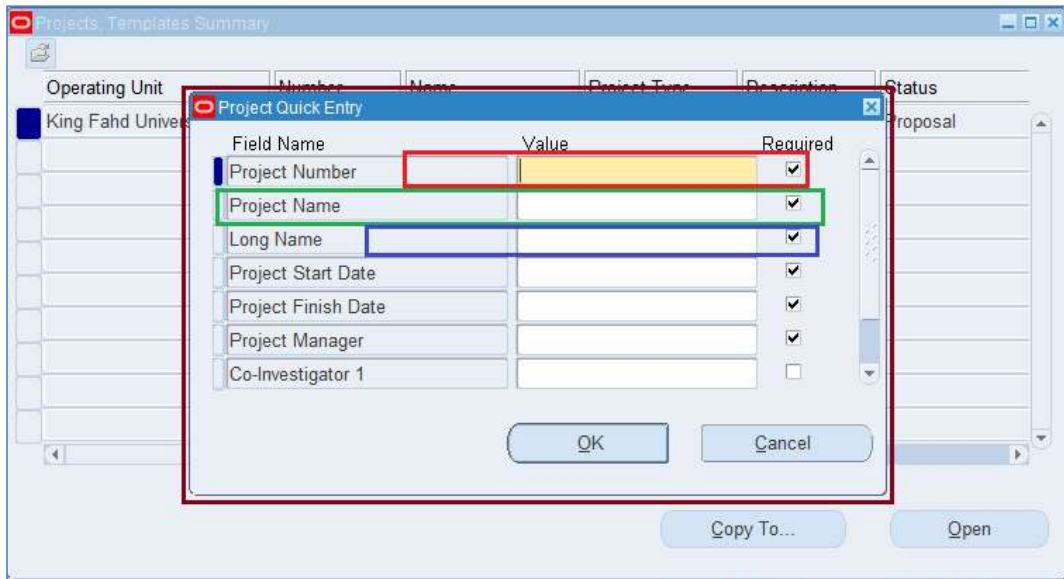


Figure 18: An Overview of Project Quick Entry Form

- Step 3.1.11: Enter the Project Number assigned by DSR (the red box, Figure 18)
- Step 3.1.12: Enter the short Name (the green box)
- Step 3.1.13: Enter the complete Project Title (the blue box)
- Step 3.1.14: Enter the Start and End Dates as per the Approved Research Project Agreement Form



Figure 19: Another view of partially filled Project Quick Entry Form

- Step 3.1.15: Click on the three dots highlighted by the red box in Figure 19 against the project manager to search for the name (Names and ID's are stored and captured from the HR Database).
- Step 3.1.16: A new form opens. Use % in the Find field (the green box) and enter a partial name as shown in Figure 20.

Employee Names

Enter a partial value to limit the list, % to see all values.

Warning: Entering % to see all values may take a very long time. Entering criteria that can be used to reduce the list may be significantly faster.

Find %shammari

Full Name	Employee Number

Figure 20: Java Form to search for employee

- Step 3.1.17: A list of names will appear as shown in Figure 21. Select the appropriate name and click OK.

Employee Names

Find %

Full Name	Employee Number
Abdallah Abdulaziz Al-Shammari	1990218
Abdullah Khamees Muhammad Al-Shammari	2130029
Adel Ayed Jarboo Al-Shammari	2091247

Figure 21: An overview of the results from the search for employee

Caution: Please note that the name of the Co-Investigator(s) (if any) can be entered later as it is not mandatory at this stage

- Step 3.1.18: Enter Keywords separated by commas in the Keywords field (the red box); A minimum of three keywords is required as shown in Figure 22.
- Step 3.1.19: Enter the academic term (the green box) in which the project has been approved as shown in Figure 22.

Project Quick Entry (King Fahd University of Petroleum and Minerals)

Field Name	Value	Required
Long Name	Post-Optimality Analysis of	<input checked="" type="checkbox"/>
Project Start Date	01-AUG-2010	<input checked="" type="checkbox"/>
Project Finish Date	01-JUL-2011	<input checked="" type="checkbox"/>
Project Manager	Abdallah Abdulaziz Al-Sha	<input checked="" type="checkbox"/>
Co-Investigator 1		<input type="checkbox"/>
Key Words (Seperated by comr)	Post-Optimality	<input checked="" type="checkbox"/>
Academic Year - Semester	2009/2010 - 2	<input checked="" type="checkbox"/>

OK Cancel

Figure 22: A Comprehensive view of Completed Project Quick Entry Form

- Step 3.1.20: Click OK (the blue box) as shown in Figure 22 to SAVE the Project Creation
- Step 3.1.21: The Project has now been created and will now appear in the list of projects, (the green box), shown in Figure 23.

- Step 3.1.22: Click on “Open” (the red box) as shown in Figure 23 to complete the submission as explained below.

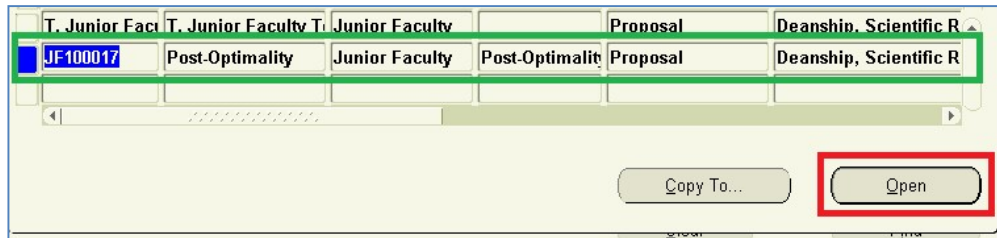


Figure 23: A Comprehensive view of list of projects for a particular individual

- Step 3.1.23: Click on the blank field (the red box) as shown in Figure 24 to enter your department. The project manager will enter here his department, to which he is affiliated.

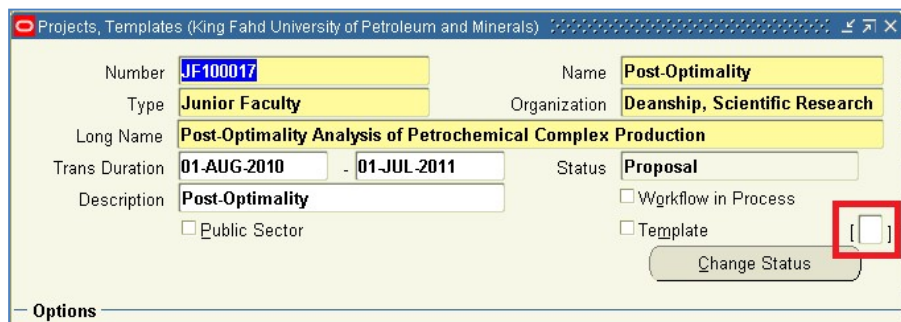


Figure 24: A Comprehensive view of projects form to enter academic department

- Step 3.1.24: A new form opens, use % and enter a partial name of your department as shown in Figure 25 (the green box) and click OK (the red box) to select the department from the list of values.

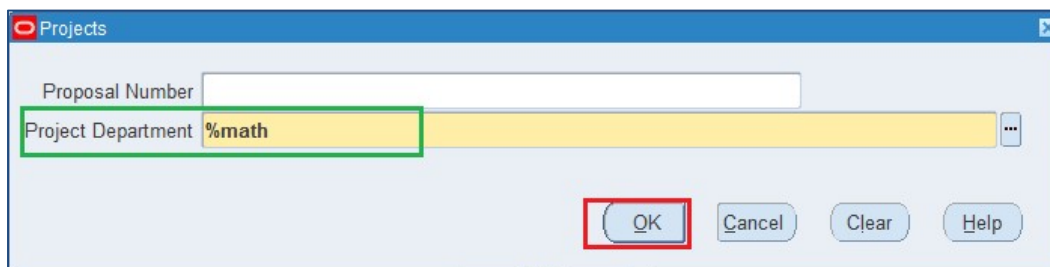


Figure 25: Java Form to search for academic department

- Step 3.1.25: List of matching department names will appear as shown in Figure 26. Select your department (the green box) and Click OK (the red box) to Exit.

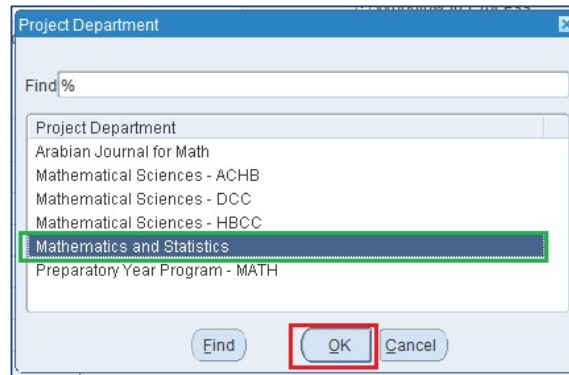


Figure 26: An overview of the results from the search for departments

- Step 3.1.26: Click the **Yellow Floppy Disk** in the top toolbar menu to save the entry as shown in Figure 27 (the red box)

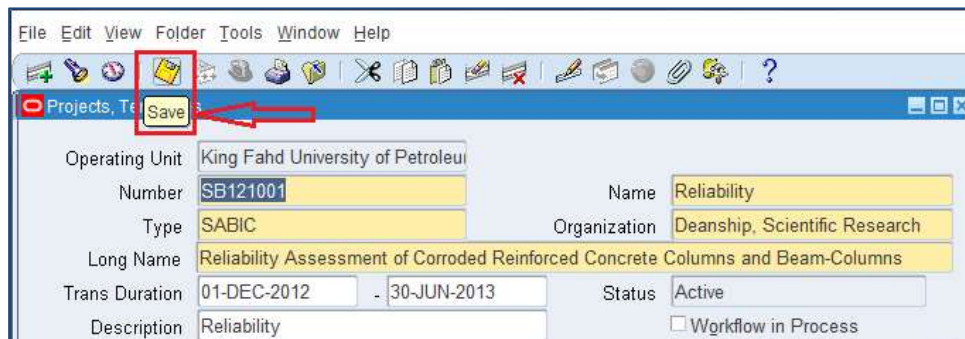


Figure 27: Option to save the data entries

- Step 3.1.27: Click on **Key Members** (the red box) so that it is highlighted in blue color to enter the details of the Investigators if any. Then Click on **Details** (the green box) to enter the member's Information, as shown in Figure 28.



Figure 28: Option to enter details of other key members (if any)

Caution: The name of the project manager will be available from the entry made in Step 3.1.15 – 3.1.17, so he should not be entered again. Also secretaries, technician, and students name should not be entered here.

- **Step 3.1.28:** Click on the three dots (the red box) against the blank Employee Name field to search for the name (Names and ID's are stored and captured from the HR Database), as shown in the Figure 29.

Employee Name	Number	Role	From	To
Abdeslam Achour Mimouni	7040273	Project Manager	05-OCT-2009	
...			15-JAN-2010	

Figure 29: Java Form to enter key members (Co-Investigators only)

- **Step 3.1.29:** A new form opens up. Use % and enter partial name as in the find field (the green box) and as shown in the Figure 30.
- **Step 3.1.30:** If multiple entries appear, select the right name. The selected name will be highlighted in dark blue, (as shown in the red box in Figure 30). Then, click OK (the blue box) to save the entry as shown in the Figure 30.

Enter a partial value to limit the list, % to see all values.
Warning: Entering % to see all values may take a very long time. Entering criteria that can be used to reduce the list may be significantly faster.

Find|%fasi|

Employee Name	Employee_Number	Person Type
Fasial Bin Abdullah Ali Al-Turki	2104280	Employee
Fasial Bin Salman Mohammed Al...	2121367	Employee
Mohammed Abdul Fasi	7133846	Employee
Mohammed Fasiuddin	7063465	Employee

Find OK Cancel

Figure 30: Java Form to search for employee

To enter more Investigators repeat **“Step 3.1.28”** and **“Step 3.1.30”** until all the entries are done

- **Step 3.1.30:** By default, the key member forms allow only seven co-investigators to be added, however if there are more, then select any row (the selected row will be highlighted in dark blue, see Figure 31 (the green box) and click on “Plus Sign” (Top left Corner) as shown in Figure 31 (the red box). A new blank row will be added, as seen in Figure 31 (the blue box).

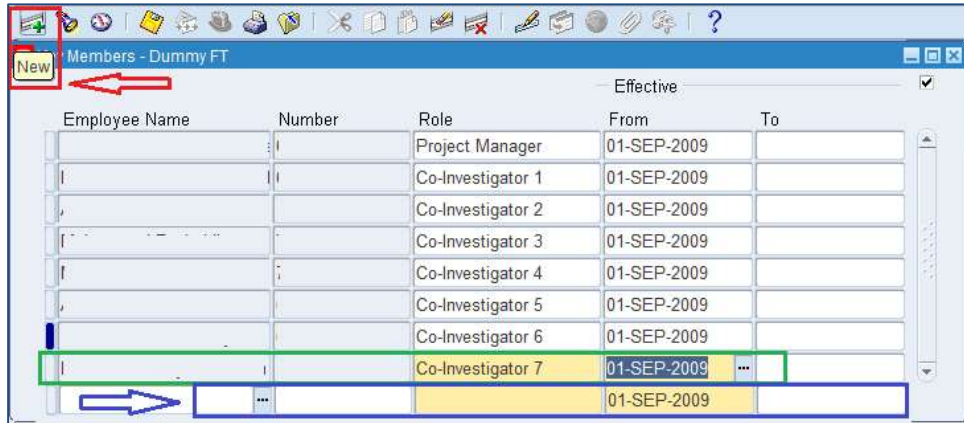


Figure 31: Procedure for adding new Row to Key member form

Caution: After entering the details of the key members, only the first part of creating the project in ERP is complete. However, as seen from the Figure 32 below, the project status still shows as “Proposal”. The Second Part of the Budget Creation and Submission needs to be completed (explained below in Section 3.2) before the system allows changing the status from “Proposal” to “Submitted”.

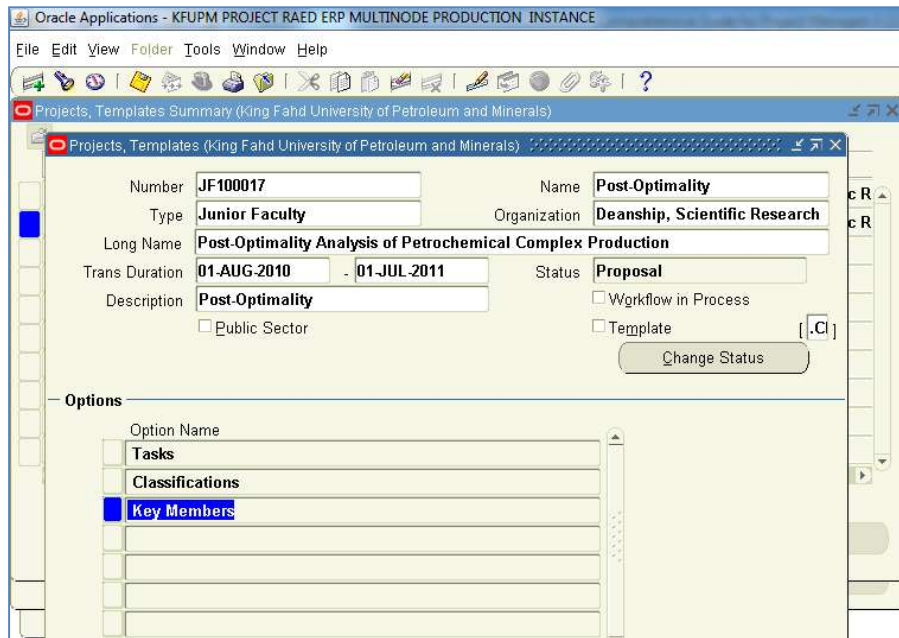


Figure 32: An overview of the Project Creation

- Step 3.1.31: Close all windows and navigate back to the main window as shown in the Figure 33.

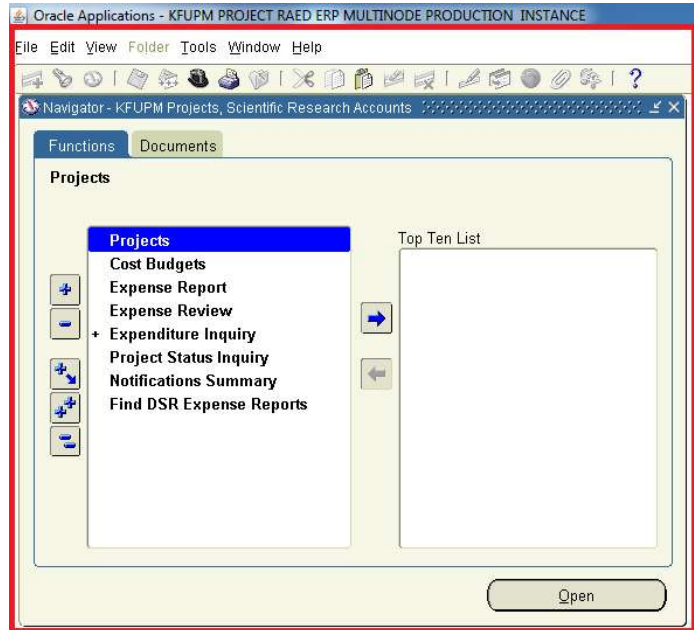


Figure 33: Main Window for Projects Module

The next part concerning Budget Creation and Submission can be done through two options, namely:

- Option # 1: If you would like to come back later, “Exit” Oracle Application by either closing the window shown above or by selecting “Exit” from the File Menu (located on the Top of the browser page)

For proceeding with the completion of Budget Creation using Option # 1, follow steps Step 3.2.1 onwards of this document.

- Option # 2: Budget Creation can be done right away by selecting “Cost Budgets” from the Figure 33 and clicking Open.

For proceeding with the completion of for Budget Creation using Option # 2, Skip to Step 3.2.7 of this document.

3.2. Budget Creation on ERP

- Step 3.2.1: Go to portal home page <http://portal.kfupm.edu.sa> as shown in Figure 34



Figure 34: Portal Login Page

- Step 3.2.2: Login to the Portal (above) using your User Name and Password
- Step 3.2.3: Click on **“eBusiness”** as shown in Figure 35 (the red box).

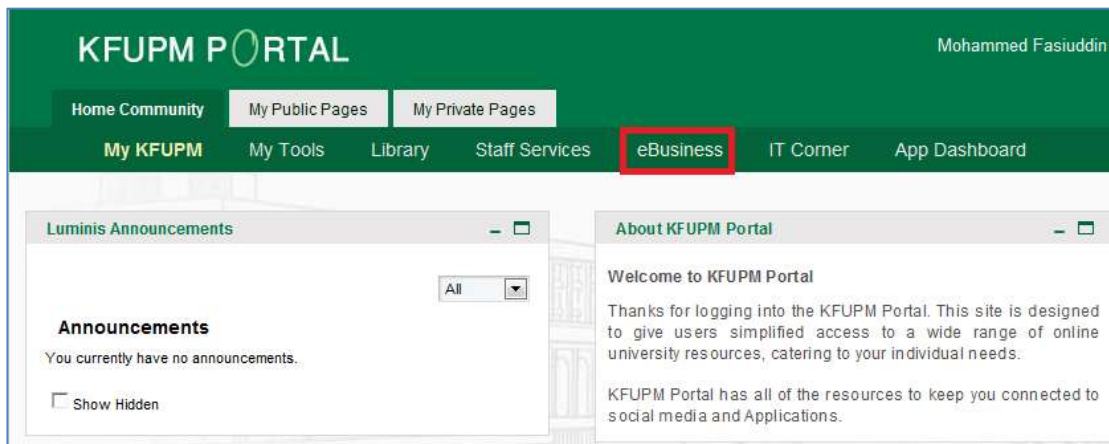


Figure 35: Link to E-Business from the Portal Web page

- Step 3.2.4: Login into E-Business with the User name and Password provided by ITC as shown in Figure 36.



Figure 36: E-Business Login Page

- Step 3.2.5: Click on the “KFUPM Project Manager, DSR” Responsibility (the red box) as shown in Figure 37.



Figure 37: Link to KFUPM Project Manager, DSR responsibility to Create Budget

- Step 3.2.6: To start creating budget(s) or complete unfinished submissions click on “Cost Budgets” (the red box) available under KFUPM Project Manager, DSR responsibility as shown in Figure 38.



Figure 38: Link to Start Creating New budget(s) or complete unfinished submissions

Caution: The application starts by opening a new Java window as shown in Figure 39 for entering the approved budget. Restrictions on running Java applications or the existence of pop blockers in your system may prevent the window from opening. Make sure that Java is granted the required permissions, and that pop-blockers (if any) are disabled.

Figure 39: Main Form for Entering the Approved Budget

- **Step 3.2.7:** Enter the Project Number in the first cell (the red box), shown in Figure 39 above. Press “Tab”, and the System will automatically populate the Project Name and budget Type and the cursor will move automatically to the Budget Type Cell, as shown in Figure 40.

Figure 40: Procedure to locate an already existing project for budget entry

- **Step 3.2.8:** The status field (the red box) in Figure 40 above is Null (or empty) and pressing the Tab key again changes the status to “Working” (the red box) as seen in Figure 41. In addition the following changes also happen
 - Entry Method is automatically populated (the green box in Figure 41)
 - Resource list is automatically populated (the green box)
 - Budget creation date is automatically populated (the blue box)

Figure 41: Comprehensive view of the Budget Entry First Form

- **Step 3.2.9: Click on Details (black box in Figure 41 above) at the bottom of budget entry form to enter the detailed budget. A new form opens as shown in the Figure 42.**

Figure 42: Detailed budget lines entry form

Start Entering the Budget Lines as per the Approved Itemized Budget (of which a copy is sent to the PI from the Research Office along with the Project Approval memo), starting from the First Row under Resource Alias

- **Step 3.2.10: Click on the 3 dots (the red circle), as shown in Figure 43 to open a new window for the resources list.**

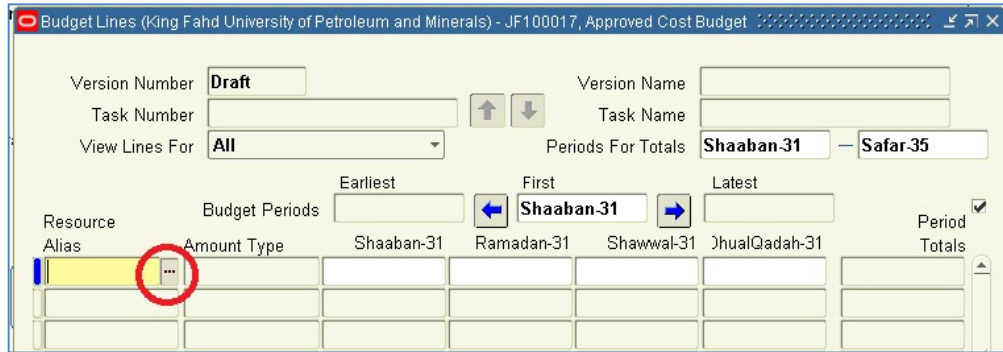


Figure 43: Procedure to open the budget lines resource list

- Step 3.2.11: Once the resource list opens (Figure 44 below), use % Sign in the empty space (the green box) and click Find to generate a list of Resources as shown in Figure 45.

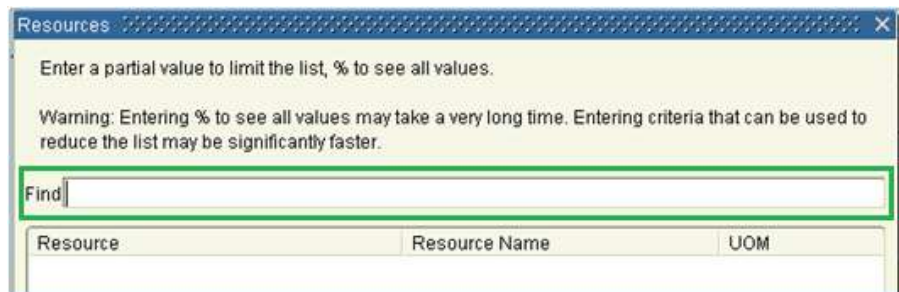


Figure 44: Procedure to locate the budget items on the resource list

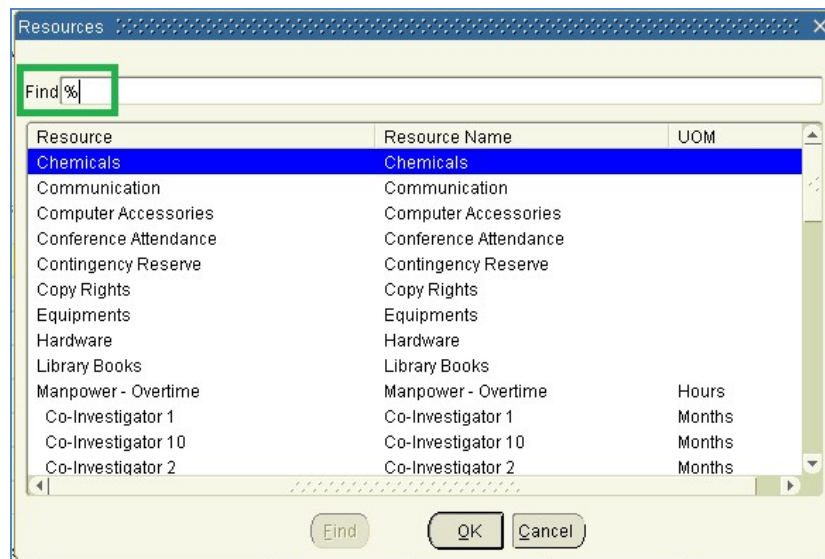


Figure 45: An overview of the budget items on the resource list

- Step 3.2.12: Select the desired resource and it will be highlighted in blue (e.g. Chemicals is selected in Figure 46), and then click OK.

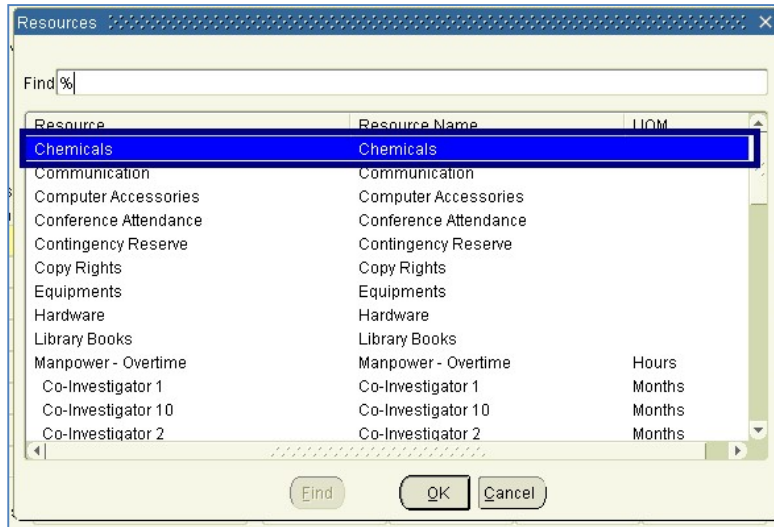


Figure 46: Selecting the appropriate resource item from the list

- Step 3.2.13: Click on the three dots (the red box in Figure 47), and a new window opens. From the available entries, select Amount Type as “Raw Cost” (the blue box) as shown in the Figure 47.

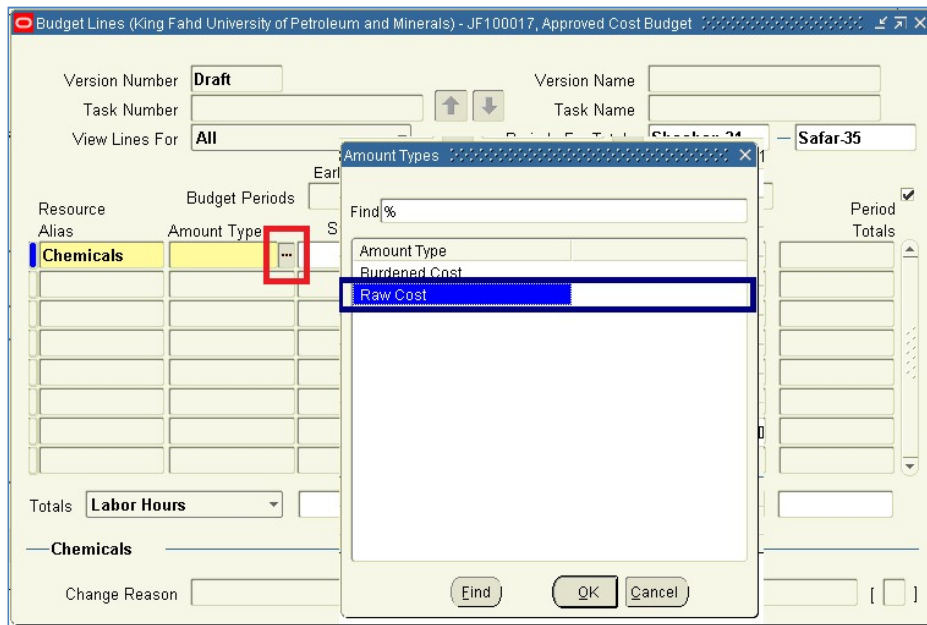
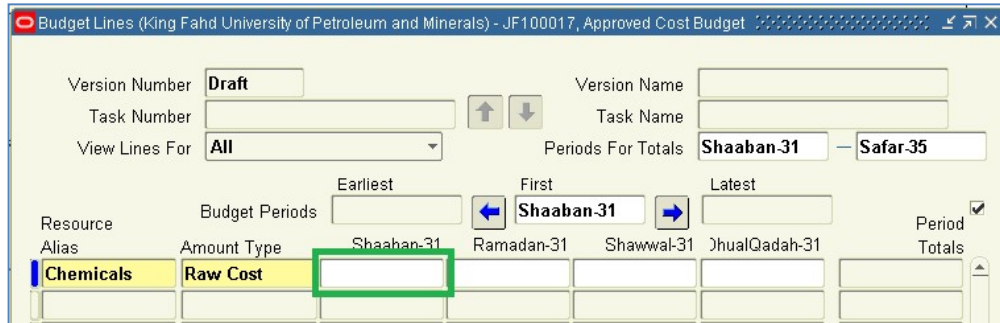


Figure 47: Selecting the appropriate Type of Cost under Amount Type

- Step 3.2.14: Enter the amount in the cell next to the Amount Type (the green box in Figure 48) in the column titled with the Arabic month as shown in Figures 48(A) and 48(B).



(A)



(B)

Figure 48: Entering the approved funds allocation against the resource item

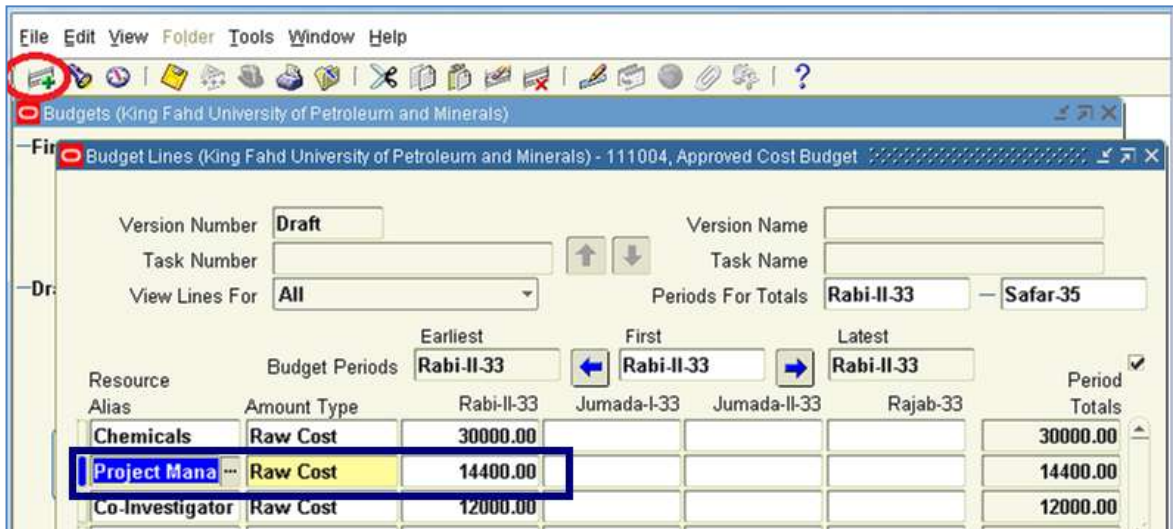
- Step 3.2.15: Now move to the next row (the cells just below the filled-in ones) and repeat Steps 3.2.10 through 3.2.14 to enter the remaining budget items. A more comprehensive Figure of various entries is shown in the Figure 49.

Resource Alias	Amount Type	Rabi-II-33	Jumada-I-33	Jumada-II-33	Rajab-33	Period Totals
Chemicals	Raw Cost	30000.00				30000.00
Project Manage	Raw Cost	14400.00				14400.00
Co-Investigator	Raw Cost	12000.00				12000.00
Student - Maste	Raw Cost	7200.00				7200.00
Secretary	Raw Cost	1000.00				1000.00
Technician	Raw Cost	4800.00				4800.00
Equipments	Raw Cost	10000.00				10000.00
Conference Atte	Raw Cost	10000				
Totals	Labor Hours	0.00	0.00	0.00	0.00	

Figure 49: Comprehensive view of the budget items entered as per the approved budget

If all the budget lines are exhausted as shown in Figure 49 and the approved budget still have more items to be entered, new rows need to be added and the procedure is explained below.

- Step 3.2.16: Select any completed cell (gets highlighted in blue) and then click the “Plus sign” (the red circle in Figure 50(A)) on the top-left corner as shown in Figure 50(A). A new row immediately after that selected row is added, as shown in Figure50(B) (the green box).



(A)



(B)

Figure 50: Procedure to add new rows to the budget sheet

- Step 3.2.17: Repeat Step 3.2.16 for adding more rows and then follow Step 3.2.10 through Step 3.2.14 to enter the data for the newly added budget item.
- Step 3.2.18: Once all approved items are entered in the budget lines, click the **Yellow Floppy Disk (the red box)** in the top Toolbar Menu to save the entries as shown in the Figure 51.

The System will automatically calculate **"Burdened Cost"** (highlighted in blue in Figure 52) for all items and **"Month"** (the green box) (with Zero Value, since the value was entered as Raw Cost) for Manpower (Please do not be alarmed, as this is how it is done). A comprehensive Figure is shown in the Figure 52.

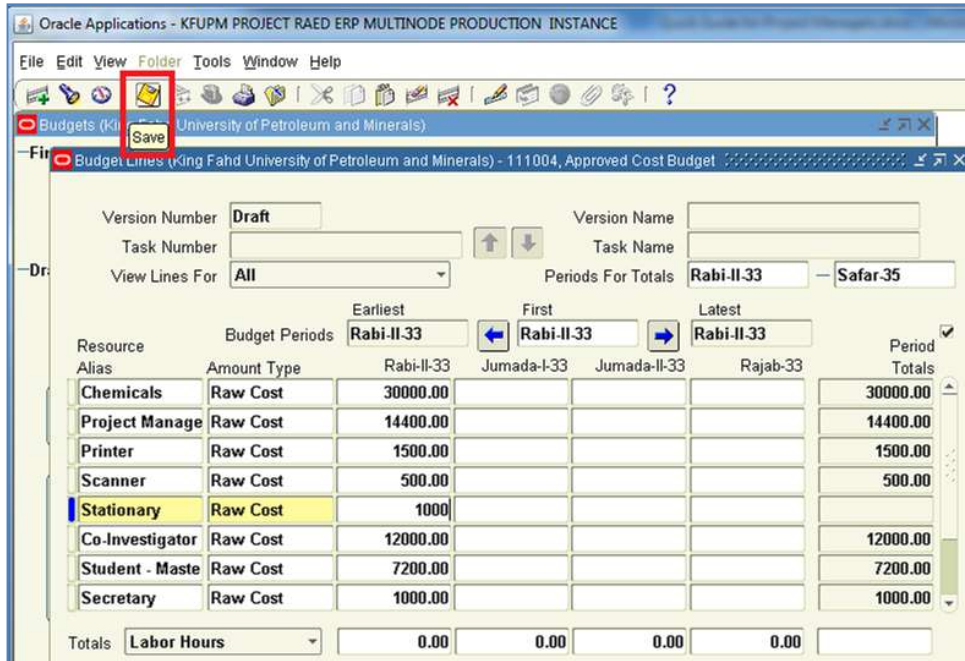


Figure 51: Procedure to save the budget lines entry

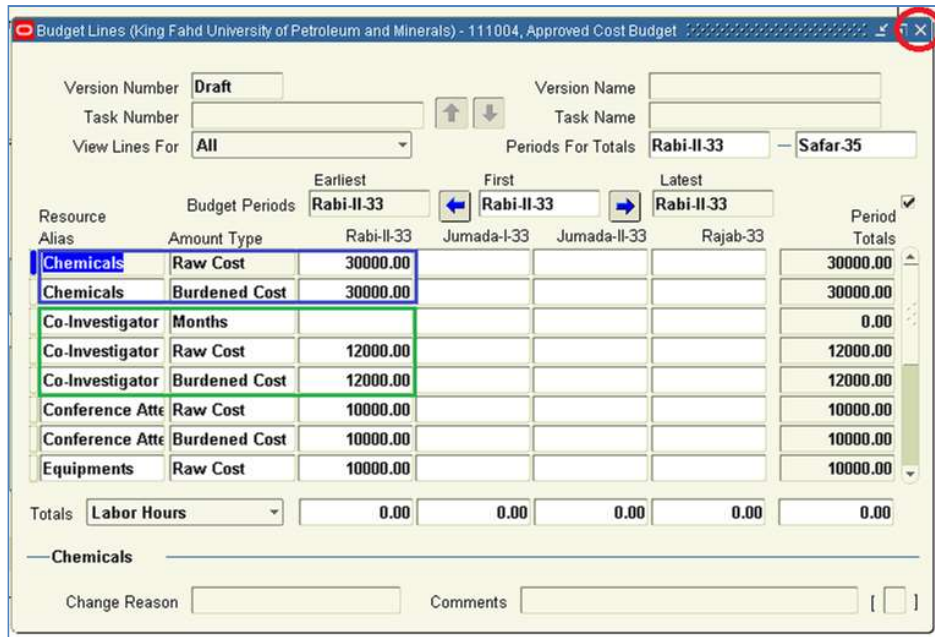


Figure 52: Comprehensive view of budget entry form after saving data

- Step 3.2.19: Close the Budget Lines Window by clicking the "X" (the red circle) as shown in the Figure 52.

- **Step 3.2.20:** This takes you to the main Budget Window as shown in Figure 53. Verify the approved budget against the total value entered “Raw Cost” (the blue box) and then Click on “Submit” (the red box) as shown in Figure 53.

Find Budget

Project Number: SB101010
 Project Name: Direction Finding Array
 Budget Type: Approved Cost Budget

Draft Budget

Version Name: Jan2011
 Status: Working
 Change Reason:
 Description:
 New Original

Entry Options

Entry Method: Scientific Res Budget Entry
 Resource List: Scientific Research Resource

Totals

Labor		Burdened		Revised Date
UOM	Quantity	Raw Cost	Cost	
Draft Hour	18.00	114000.00	114000.00	10-SEP-2012 14:24:56
Current Hour	18.00	114000.00	114000.00	10-SEP-2012 14:25:11

Buttons: History, Copy Actual ..., Rework, Submit, Details

Figure 53: Comprehensive view of Main budget entry form

Once Submitted, the Status of the budget (the green box) in Figure 53 changes from Working to Submitted shown in the Figure 54.

Find Budget

Project Number: SB101010
 Project Name: Direction Finding Array
 Budget Type: Approved Cost Budget

Draft Budget

Version Name: Jan2011
 Status: Submitted
 Change Reason:
 Description:
 New Original

Figure 54: Reflecting the changes to the budget status

- **Step 3.2.21:** After budget submission, the second part of creating project ERP is also complete. Close the Budget Main Window by Clicking the “x” at the top-right corner (highlighted by the red circle in Figure 55). This takes you to the main Navigator Window as shown in Figure 56.

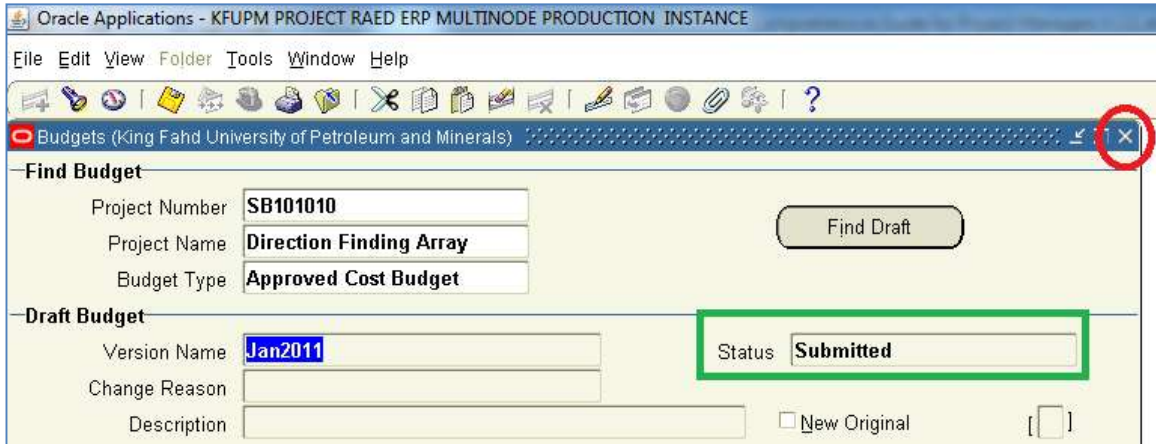


Figure 55: Procedure to exit the Budget entry form to navigate to main window

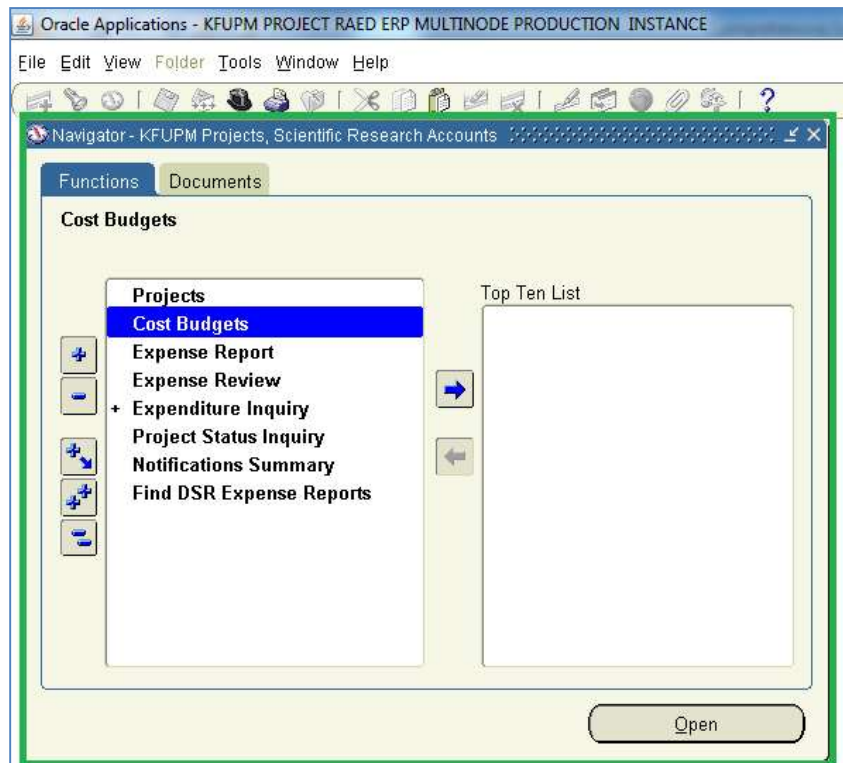


Figure 56: An overview of the Project Navigation Main Window

3.3. Modifications to the Submitted Budget

The project budget can be modified as long as the project status is “Proposal” and the procedure is explained in this Section. The budget submission should not be mistaken for project submission. Once the project status is changed (which will be explained in Section 3.4), no changes can be made to the project.

- **Step 3.3.1:** After submitting the budget, budget status showing “Submitted” (the red box) as explained in Step 3.2.20 (See Figure 53), the view will appear as shown in Figure 57. In case budget modifications or rectifications are needed, click on “Rework” (the green box).

The screenshot shows the 'Budgets' application window. The 'Find Budget' section has input fields for Project Number, Project Name, and Budget Type (set to 'Approved Cost Budget'), with a 'Find Draft' button. The 'Draft Budget' section includes Version Name, Change Reason, and Description fields, a 'Status' dropdown menu (highlighted with a red box and set to 'Submitted'), and a checked 'New Original' checkbox. The 'Entry Options' section shows 'Entry Method' as 'Scientific Res Budget Entry' and 'Resource List' as 'Scientific Research Resource Li'. The 'Totals' section contains a table with columns for Labor, UOM, Quantity, Raw Cost, Burdened Cost, and Revised Date. The 'Draft' row shows a Raw Cost of 55000.00 and a Burdened Cost of 55000.00, with a revised date of 20-FEB-2014 14:27:27. The 'Current' row is empty. At the bottom, there are buttons for 'History', 'Copy Actual ...', 'Rework' (highlighted with a green box), 'Baseline', and 'Details'.

	Labor	UOM	Quantity	Raw Cost	Burdened Cost	Revised Date
Draft				55000.00	55000.00	20-FEB-2014 14:27:27
Current						

Figure 57: Comprehensive view of budget form after budget submission

The Budget lines entry form open and the field(s) requiring the modification or rectification should be selected first, as shown in Figure 58 (A).

- **Step 3.3.2:** For instance in case of this project under test, say the “Co-Investigator 1” hours needs to be changed from the original existing value. Select the field as shown in Figure 58 (A) and modify it. The changes are immediately reflected as shown in Figure 58 (B).

Budget Lines (King Fahd University of Petroleum and Minerals) - SB121002, Approved Cost Budget

Version Number: Draft Version Name:

Task Number: Task Name:

View Lines For: All Periods For Totals: Jumada-I-34 - Jumada-I-34

Budget Periods: Earliest: Jumada-I-34 First: Jumada-I-34 Latest: Jumada-I-34

Resource Alias	Amount Type	Jumada-I-34	Jumada-II-34	Rajab-34	Shaaban-34	Period Totals
Co-Investigator 1	Months	18.00				18.00
Co-Investigator 1	Raw Cost	18000.00				18000.00
Co-Investigator 1	Burdened Cost	18000.00				18000.00

(A)

Resource Alias	Amount Type	Jumada-I-34	Jumada-II-34	Rajab-34	Shaaban-34	Period Totals
Co-Investigator 1	Months	16.00				16.00
Co-Investigator 1	Raw Cost	16000.00				16000.00
Co-Investigator 1	Burdened Cost	16000.00				16000.00

(B)

Figure 58: Procedure for modification or rectification of existing budget value

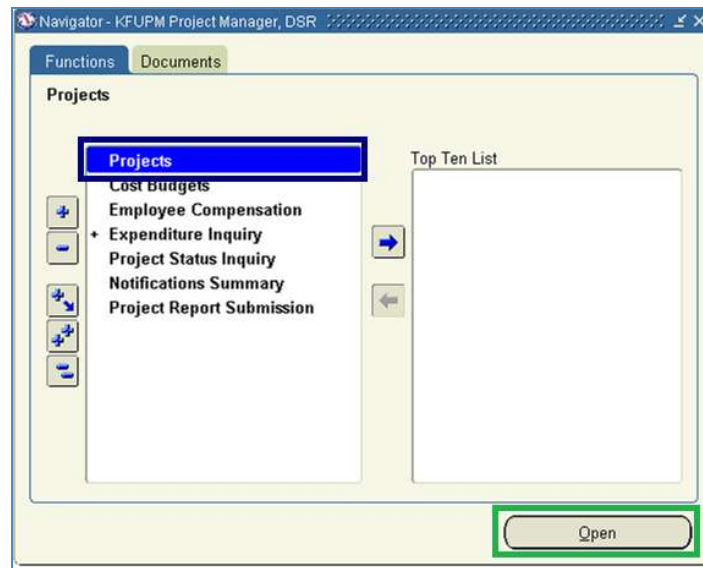
- **Step 3.3.3:** Once the changes are done, click the **Yellow Floppy Disk (the red box)** on the Top Menu to Save the entries as shown in the Figure 51.
- **Step 3.3.4:** Close the Budget Lines Window by **clicking the "X" (the red circle)** as shown in Figure 52.
- **Step 3.3.5:** This takes you to the main Budget Window as shown in Figure 53. Verify the approved budget against the total value entered **"Raw Cost" (the blue box)** and then click on **"Submit" (the red box)** as shown in Figure 53.
- **Step 3.3.6:** **After Budget Submission, the second part of creating project ERP is also complete.** Close the Budget Main Window by clicking the **"X" marked in (the red circle)** as shown in the Figure 55. This takes you to the main navigator window as shown in Figure 56.

Now you need to go and change the status of the project, which will be explained in the next section 3.4 in detail.

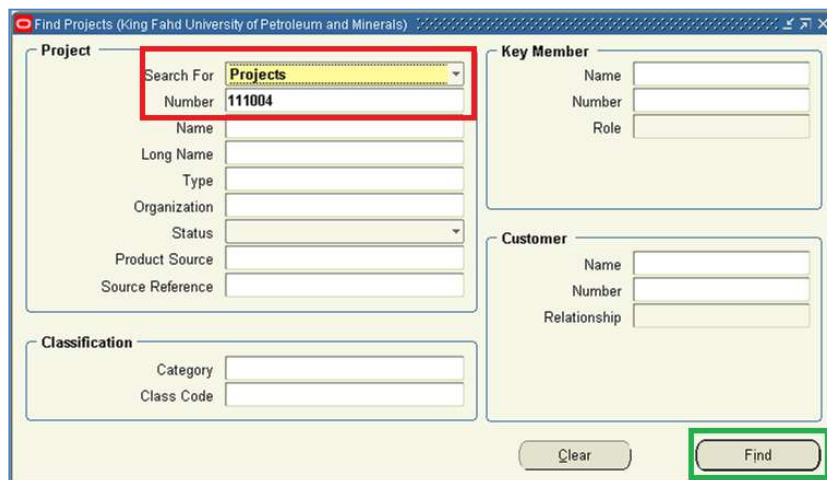
3.4. Changing Project Status

Project creation and budget submission are now complete. However, the status of the project needs to be changed, which is explained in this section

- Step 3.3.1: In the Main Navigator Window shown in Figure 59 (A), select “Projects” (the blue box) and click “Open” (the green box).
- Step 3.3.2: Select “Projects” from the Search For field and enter the Project Number (the red box) and click Find (the green box), as shown in Figure 59 (B).



(A)



(B)

Figure 59: Procedure for opening a working project

- Step 3.3.3: A new window opens showing the working project. Select the project and click Open, as shown in Figure 60

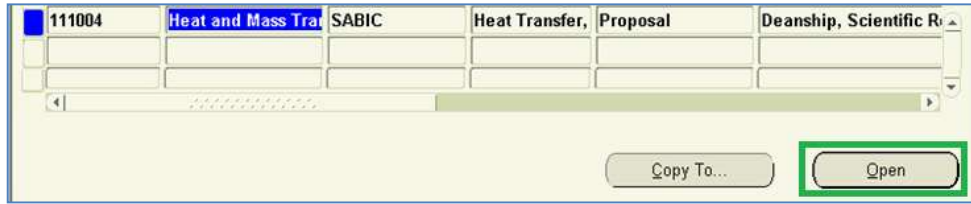
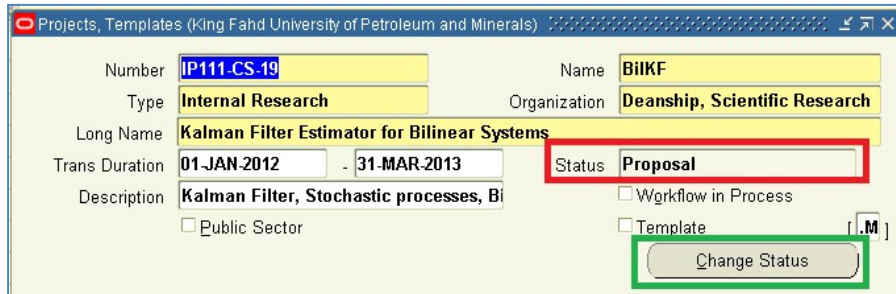
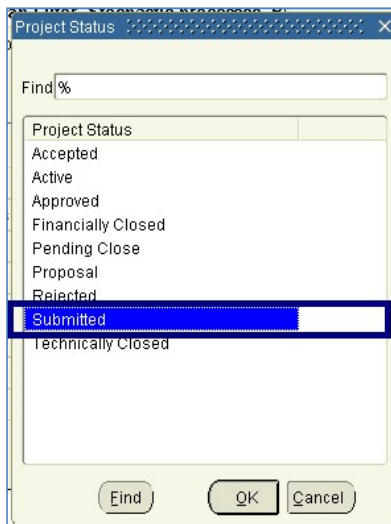


Figure 60: Procedure for opening a working project

- Step 3.3.4: Initially the project status is “Proposal” (the red box) as shown in Figure 61 (A). Click on “Change Status” (the green box), as shown in Figure 61 (A), a new window opens with a different project status as shown in Figure 61 (B). Select “Submitted” and click OK.



(A)



(B)

Figure 61: Procedure for Changing the Status of working project

The proposal status, which has been so far appearing as “Proposal” (the red box) in earlier Figures 61 (A) is now changed to “Submitted” as seen in the Figure62.

Projects, Templates (King Fahd University of Petroleum and Minerals)

Number	IN121048	Name	Body Composition
Type	Internal Research	Organization	Deanship, Scientific Research
Long Name	Impact of Three Different Types of Training on Body Composition Blood Pressure An		
Trans Duration	01-MAY-2013 - 01-MAY-2015	Status	Submitted
Description	Body Composition, Blood Pressure	<input checked="" type="checkbox"/> Workflow in Process	[.P]
	<input type="checkbox"/> Public Sector	<input type="checkbox"/> Template	

Change Status

Figure 62: Comprehensive view of the project after Submission

The project is now been successfully created and is in the submitted stage. You need to follow-up with your Department Chairman for approval, before it can be accepted by the Deanship of Research Coordinator and activated.