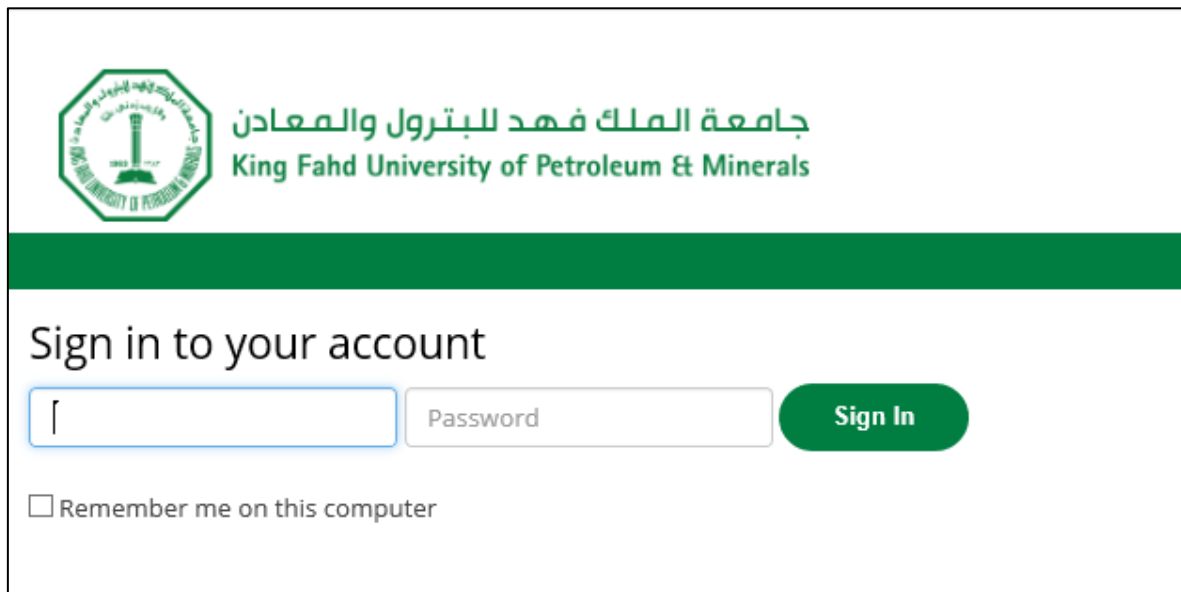# IRC Project Creation on Enterprise Resource Planning (ERP)/ E-Business

1.1. Project Creation

- **Step 1.1.1: Requirement to be connected to the university LAN and use internet explorer browser.**
- **Step 1.1.2: Go to portal home page http://portal.kfupm.edu.sa as shown in Figure 1 below.**
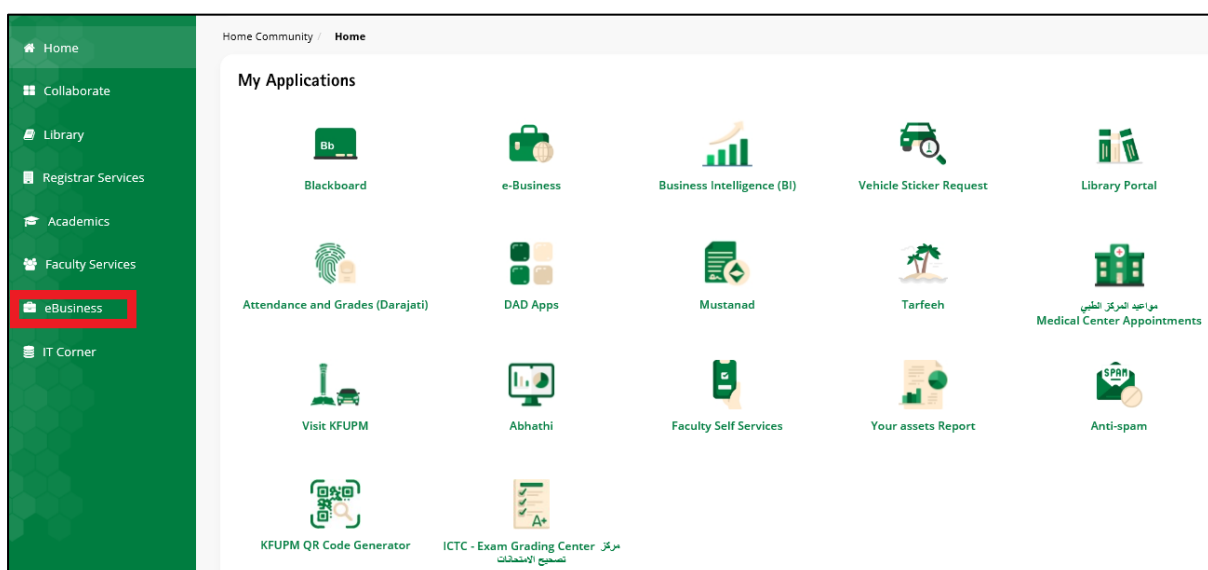
Figure 1: Portal Login Page

- **Step 1.1.3: Login into the Portal (above) using your KFUPM User Name and Password then Click on "eBusiness", highlighted in red in Figure 2 below.**

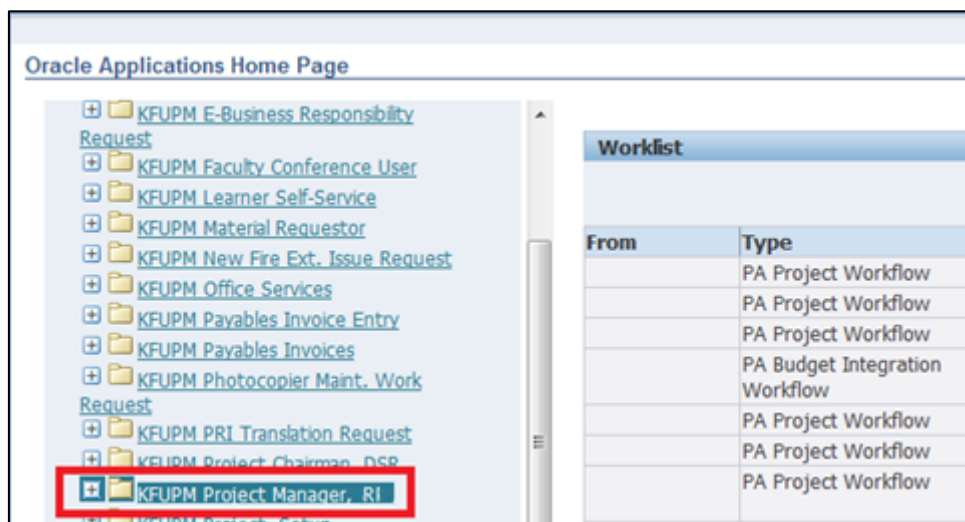**Figure 2: Link to E-Business from the Portal Web page**

- **Step 1.1.4: Login into E-Business, if necessary, with the E-Business User name and Password provided by ICTC, as shown in Figure 3.**

Figure 3: E-Business Login Page

- **Step 1.1.5: Click on the "KFUPM Project Manager, RI" responsibility, highlighted in red in Figure 4 below, for:**
    - **Creating a newly approved project or completing an unfinished submission**
    - **Creating a project's approved budget**

Caution: Please note, if the "KFUPM Project Manager, RI" responsibility is not available in your e-business; please contact **Issue a ticket on E-Desk** for having it added to your account.

Figure 4: Link to KFUPM Project Manager, RI responsibility to create projects and budgets

- **Step 1.1.6: To start creating a new project or to complete an unfinished submission, click on "Projects" available under KFUPM Project Manager, RI responsibility as highlighted in Figure 5 below.**

Figure 5: 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 6. 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.
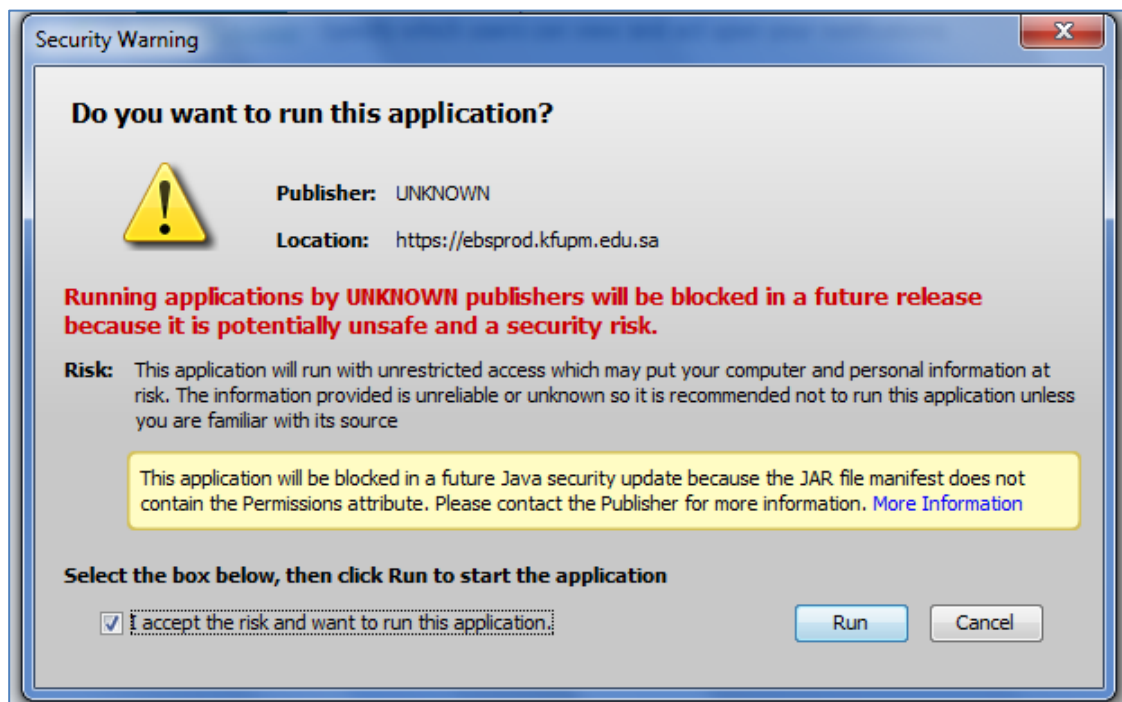

Figure 6: Security warning window when launching the Java application

- **Step 1.1.7: To start creating a new project, select "Templates" from the "Search For" field, highlighted by the red box in Figure 7.**

- **Step 1.1.8: Select the Type of grant IRC Internal Center from the field "Type", highlighted by the green box.**
- **Step 1.1.9: Click on the Find button, highlighted by the blue box**

Caution: Please note, to complete unfinished submissions, in Step 1.1.7, 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 1.1.21.

Figure 7: Overview of Java Form to Create and Search Projects

- **Step 1.1.10: Corresponding project template will open in a new form as shown in Figure 8. If your project is not the base-line project center select "T, IRC Temp Projects", or the project is the base-line project center - PI should be the director- select "T, IRC Temp Center Dir".**
- **Click on "Copy To", highlighted by the red box. Another new form "Project Quick Entry" opens, as shown in Figure 9.**

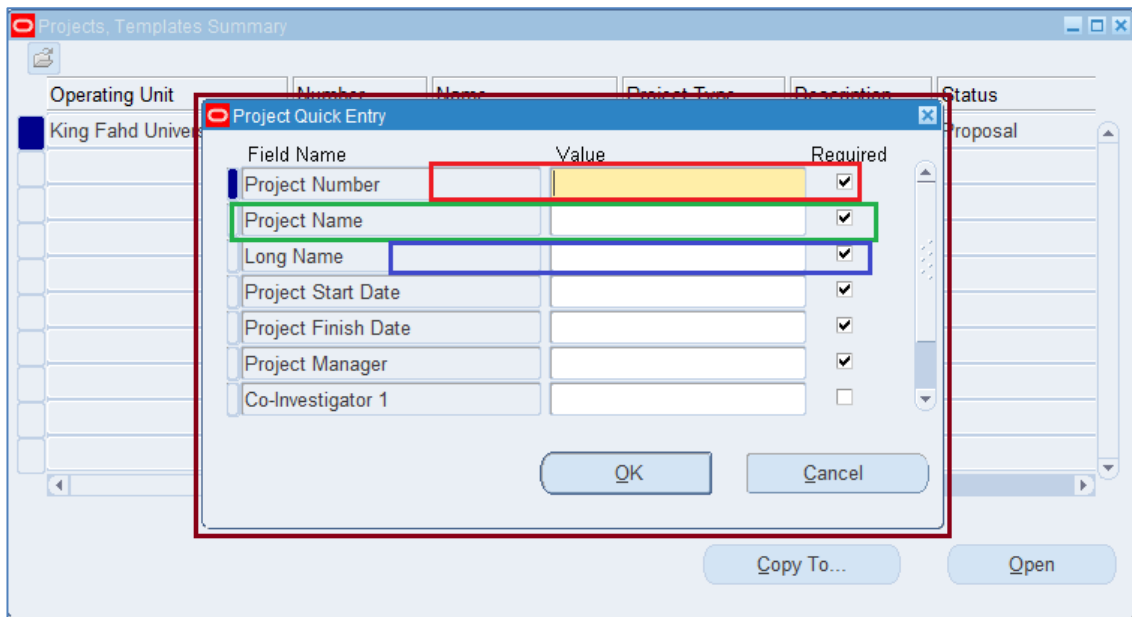**Figure 8: An Overview of Projects, Template**

Figure 9: An Overview of Project Quick Entry Form

- **Step 1.1.11: Enter the Project Number assigned by DSR (the red box, Figure 9)**
- **Step 1.1.12: Enter the short Name (the green box)**
- **Step 1.1.13: Enter the complete Project Title (the blue box)**
- **Step 1.1.14: Enter the Start and End Dates as per the Approved Research Project Agreement Form**
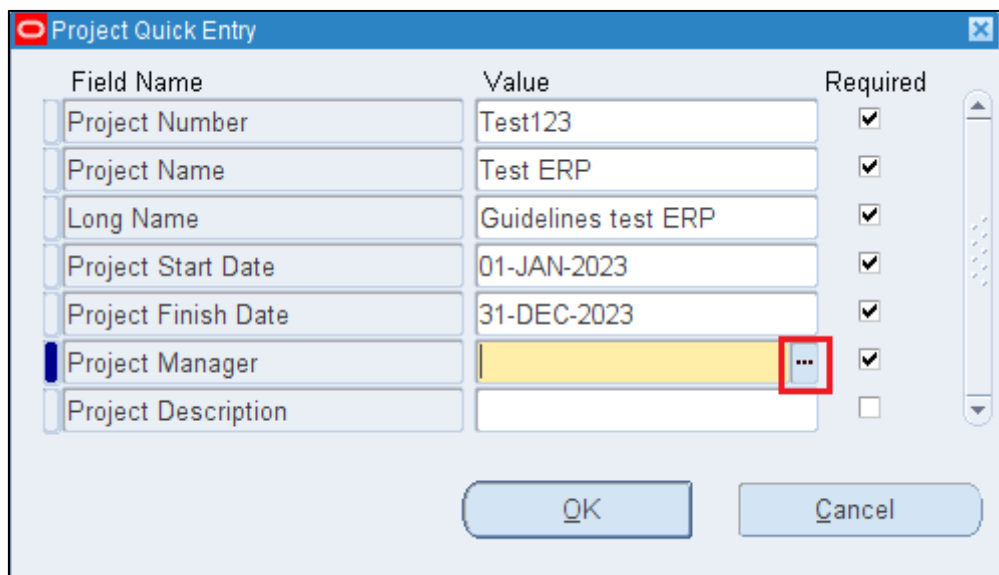

Figure 10: Another view of partially filled Project Quick Entry Form

- **Step 1.1.15: Click on the three dots highlighted by the red box in Figure 10** against the project manager to search for the name (Names and ID's are stored and captured from the HR Database).
- **Step 1.1.16: A new form opens. Use % in the Find field (the green box) and enter a partial name as shown in Figure 11.**

Figure 11: Java Form to search for employee

- **Step 1.1.17: A list of names will appear as shown in Figure 12. Select the appropriate name and click OK.**

Figure 12: 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 1.1.18: Enter Keywords separated by commas in the Keywords field (the red box); A minimum of three keywords is required as shown in Figure 13.**
- **Step 1.1.19: Enter the academic term (the green box) in which the project has been approved as shown in Figure 13.**

Figure 13: A Comprehensive view of Completed Project Quick Entry Form

- **Step 1.1.20: Click OK (the blue box)** as shown in Figure 13 to SAVE the Project Creation
- **Step 1.1.21: The Project has now been created and will now appear in the list of projects, (the green box),** shown in Figure 23.
- **Step 1.1.22: Click on "Open" (the red box)** as shown in Figure 14 to complete the submission as explained below.
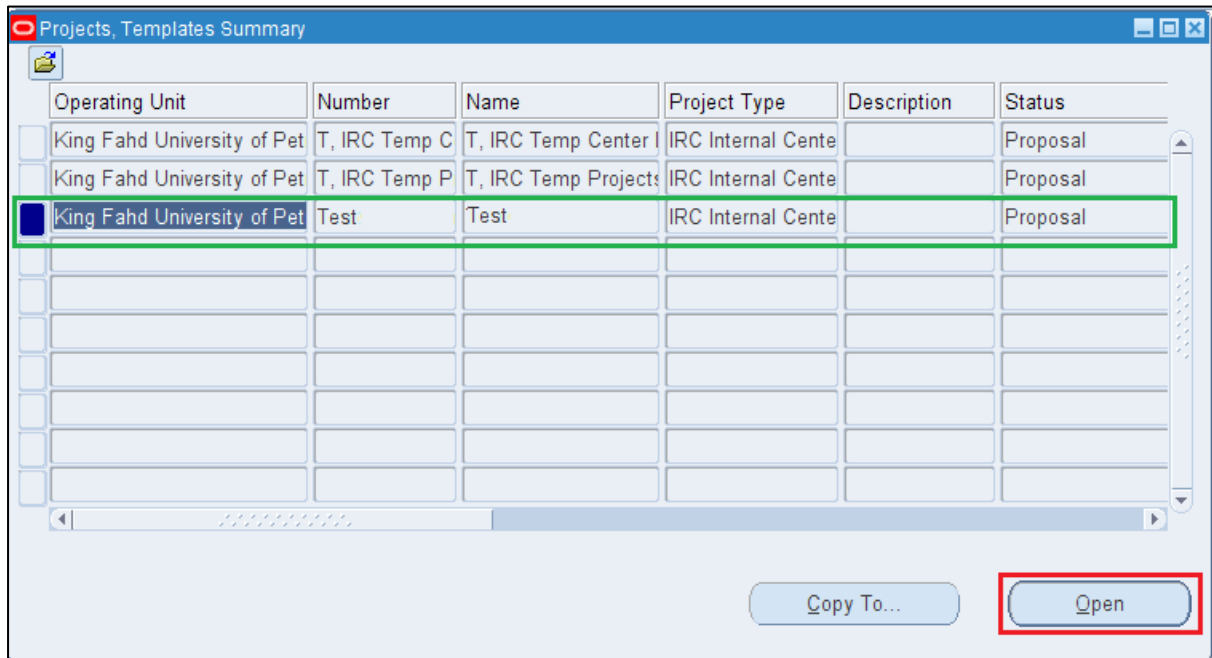

Figure 14: A Comprehensive view of list of projects for a particular individual

- **Step 1.1.23: Click on the Organization field (the red box)** as shown in Figure 15 to enter your Center. The project manager will enter here his Center, to which he is affiliated.
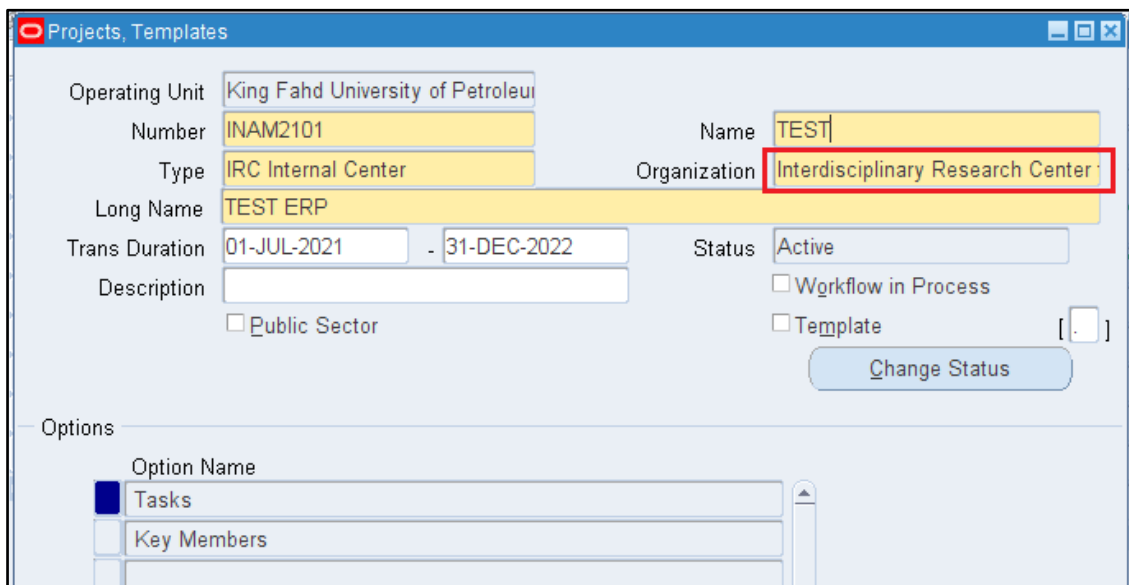

Figure 15: A Comprehensive view of projects form to enter Research Center

- **Step 1.1.24: Click on the three dots highlighted by the red box in Figure 16 Organization. Then use % and enter a partial name of your center as shown in Figure 17 (the blue box) and click enter to select the center from the list of values**
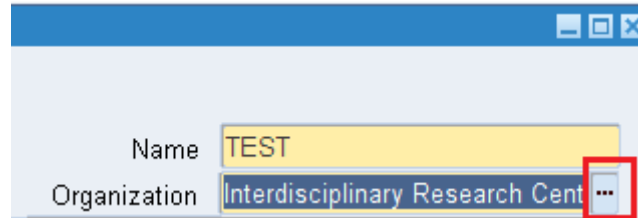

Figure 25: Java Form to search for research center

- **Step 1.1.25: List of matching Center names will appear as shown in Figure 17. Select your Center (the green box) and Click OK (the red box) to Exit.**

Figure 17: An overview of the results from the search for centers

- **Step 1.1.26: Click the <mark>Yellow Floppy Disk</mark> in the top toolbar menu to save the entry as shown in Figure 18 (the red box)**

Figure 18: Option to save the data entries

- **Step 1.1.27: 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 19.**

Figure 19: 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 1.1.15 – 1.1.17, 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 20.**

Figure 20: Java Form to enter key members (Team member only)

- **Step 1.1.29: 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 1.1.30: 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 21). Then, click OK (the blue box) to save the entry as shown in the Figure 21.**
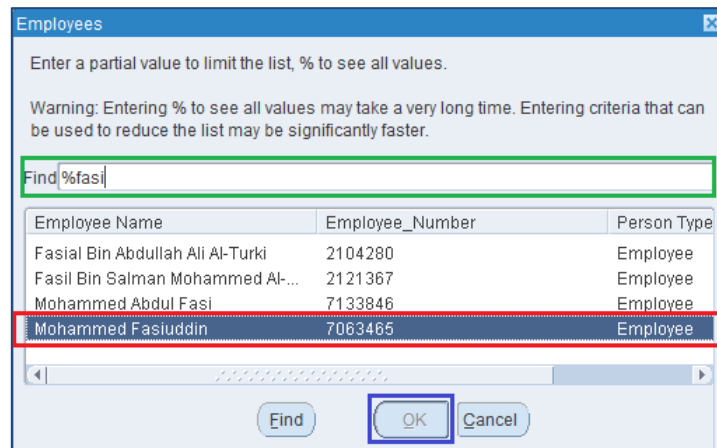

Figure 21: Java Form to search for employee

To enter more Investigators repeat "Step 1.1.28" and "Step 1.1.30" until all the entries are done

- **Step 1.1.30: By default, the key member forms allow only seven Team members to be added, however if there are more, then select any row (the selected row will be highlighted in dark blue, see Figure 22 (the green box) and click on "Plus Sign" (Top left Corner) as shown in Figure 22 (the red box). A new blank row will be added, as seen in Figure 22 (the blue box).**
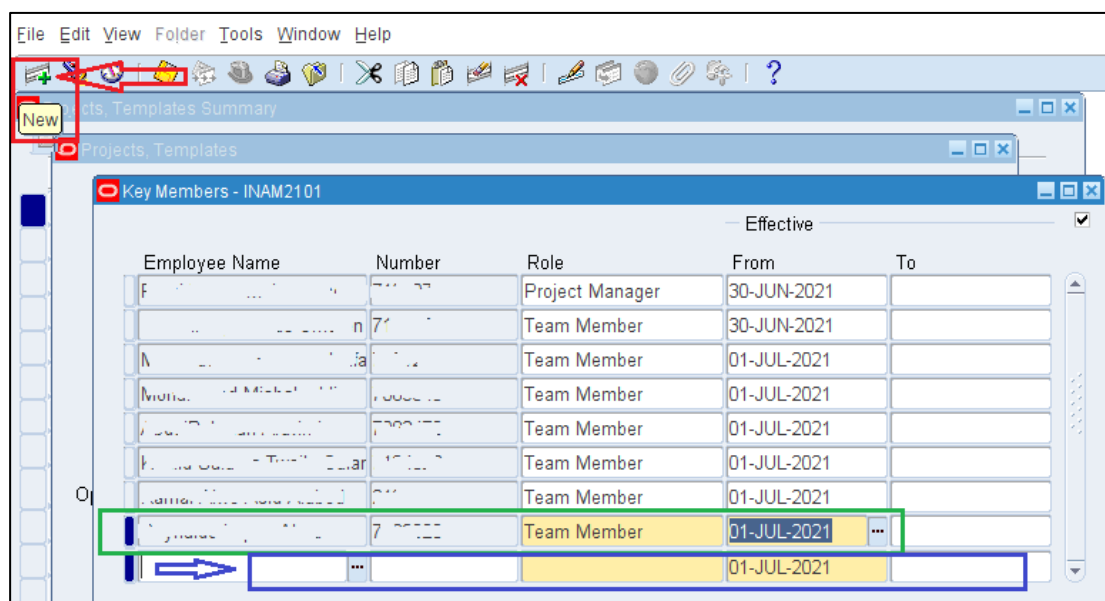

Figure 22: Procedure for adding new Row to Key member form

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 23 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 1.2) before the system allows changing the status from "Proposal" to "Submitted".

Figure 23: An overview of the Project Creation

- **Step 1.1.31: Close all windows and navigate back to the main window as shown in the Figure 24.**
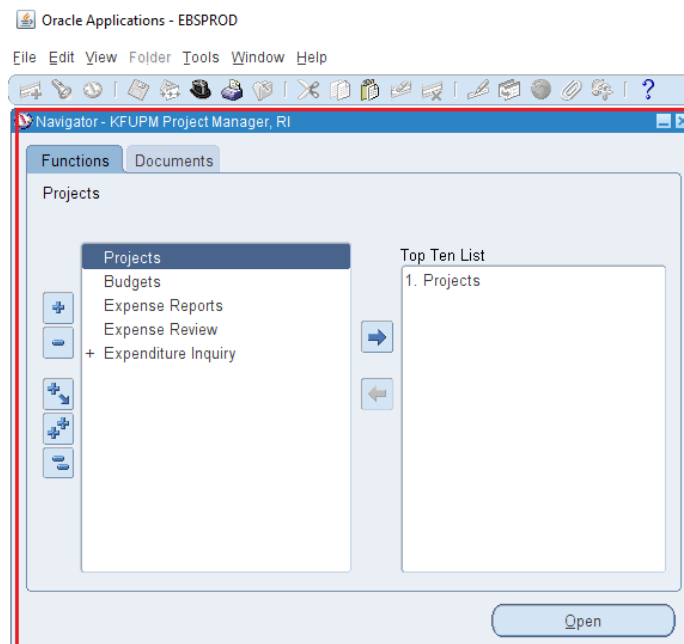

Figure 24: Main Window for Projects Module

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)**
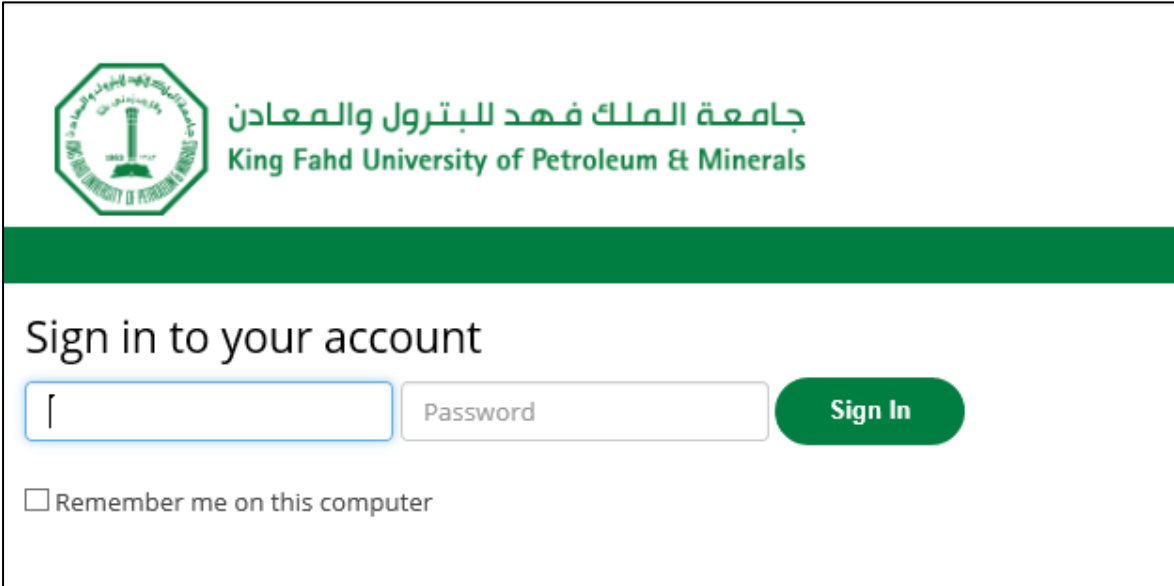
For proceeding with the completion of Budget Creation using Option # 1, follow steps Step 1.2.1 onwards of this document.

- **Option # 2: Budget Creation can be done right away by selecting "Budgets" from the Figure 24 and clicking Open.**

For proceeding with the completion of for Budget Creation using Option # 2, Skip to Step 1.2.7 of this document.

1.2.   Budget Creation on ERP

- **Step 1.2.1: Go to portal home page http://portal.kfupm.edu.sa as shown in Figure 25**
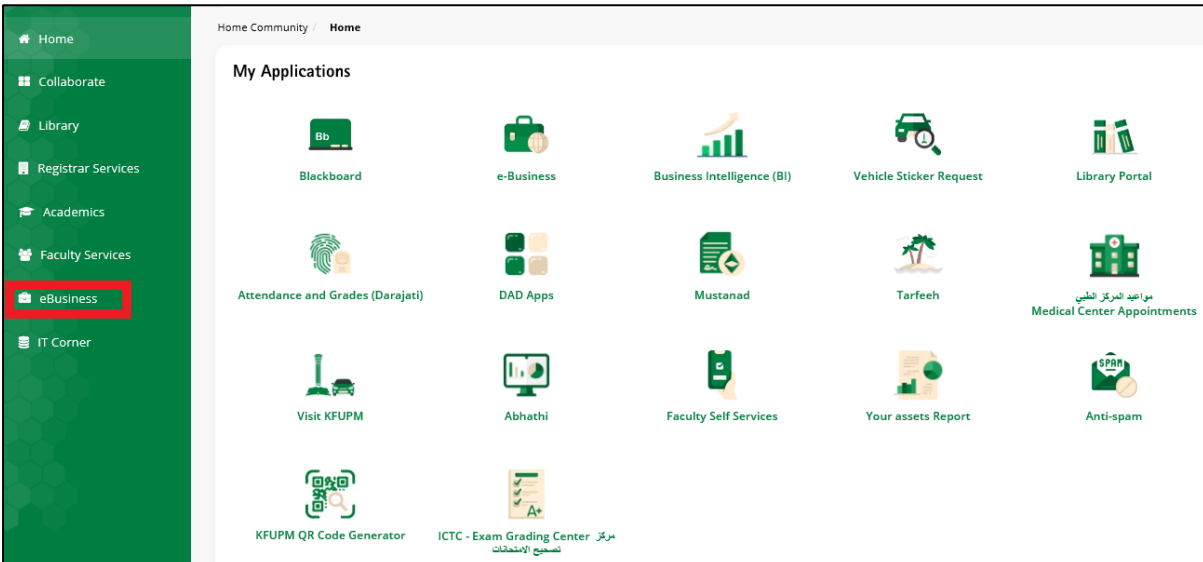
Figure 25: Portal Login Page

- **Step 1.2.2: Login to the Portal (above) using your User Name and Password**
- **Step 1.2.3: Click on "eBusiness" as shown in Figure 26 (the red box).**

Figure 26: Link to E-Business from the Portal Web page

- **Step 1.2.4: Login into E-Business with the User name and Password provided by ICTC as shown in Figure 27.**
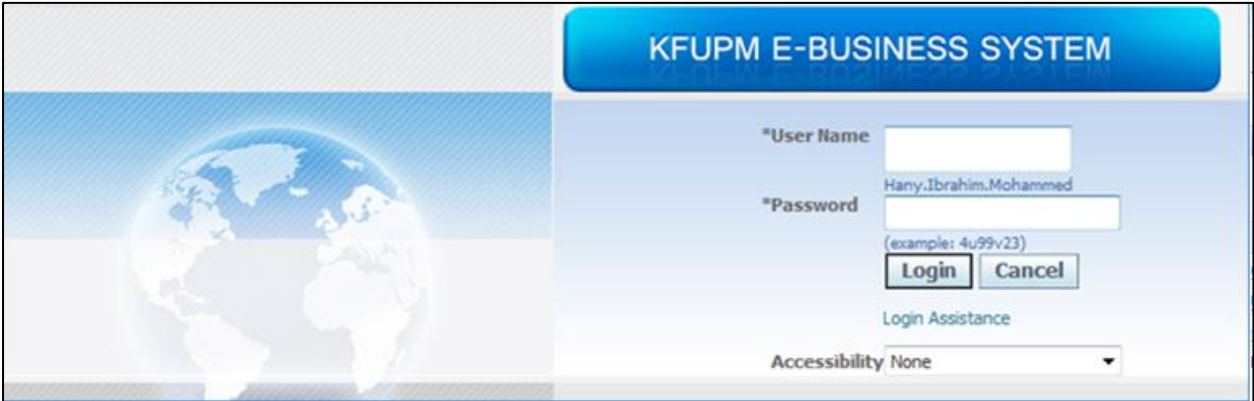
Figure 27: E-Business Login Page

- **Step 1.2.5: Click on the "KFUPM Project Manager, RI" Responsibility (the red box) as shown in Figure 28.**
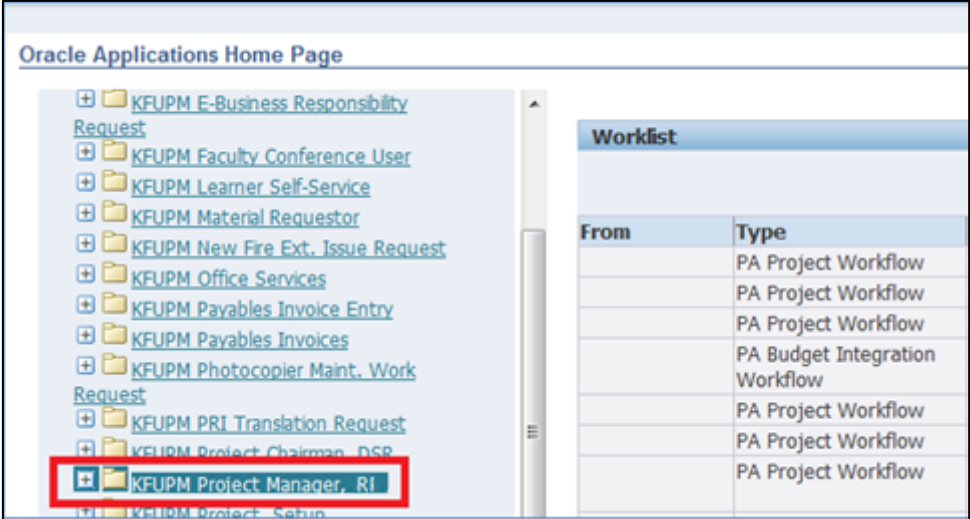

Figure 28: Link to KFUPM Project Manager, DSR responsibility to Create Budget

- **Step 1.2.6: To start creating budget(s) or complete unfinished submissions click on "Budgets" (the red box) available under KFUPM Project Manager, RI responsibility as shown in Figure 29.**
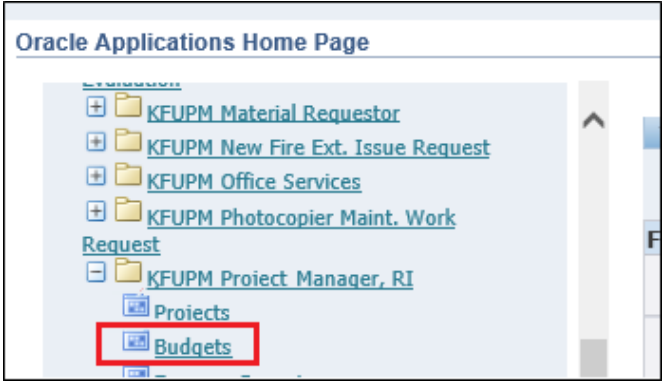

Figure 29: Link to Start Creating New budget(s) or complete unfinished submissions

Caution: The application starts by opening a new Java window as shown in Figure 40 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 30: Main Form for Entering the Approved Budget

- **Step 1.2.7: Enter the Project Number in the first cell (the red box), shown in Figure 30 above. Press "Tab", and the System will automatically populate the Project Name and then select the budget Type by click on three dots … and select Approved cost Budget then click OK shown in Figure 31.**

Figure 31: Procedure to locate an already existing project for budget entry

- **Step 1.2.8: The status field (the red box) in Figure 31 above is Null (or empty) and pressing the Tab key again changes the status to "Working" (the red box) as seen in Figure 32. In addition the following changes also happen**
  - **Entry Method is automatically populated (the green box in Figure 32)**

- o **Resource list is automatically populated** (the green box)
- o **Budget creation date is automatically populated** (the blue box)

Figure 32: Comprehensive view of the Budget Entry First Form

- **Step 1.2.9: Click on Details (black box in Figure 32 above) at the bottom of budget entry form to enter the detailed budget. A new form opens as shown in the Figure 33.**

Figure 33: Detailed budget lines entry form

- **Step 1.2.10: Click on the 3 dots (the red circle), as shown in Figure 34 to open a new window for the resources list.**
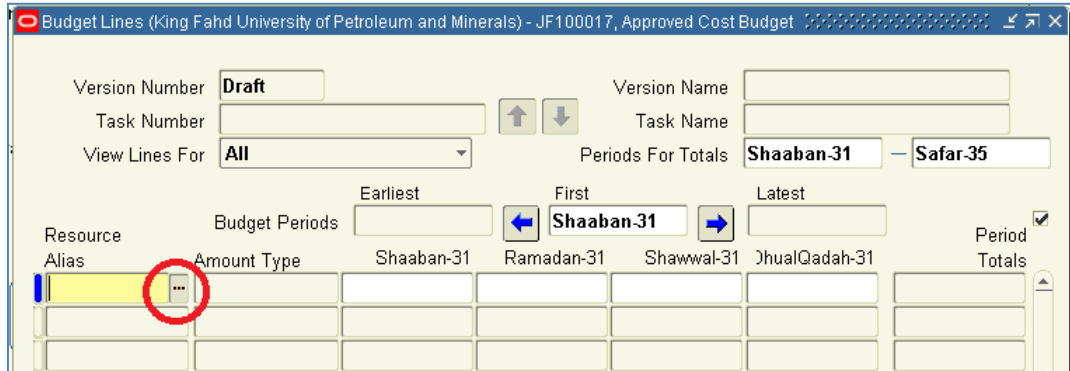
Figure 34: Procedure to open the budget lines resource list

- **Step 1.2.11: Once the resource list opens (Figure 35 below), use % Sign in the empty space (the green box) and click Find to generate a list of Resources as shown in Figure 36.**
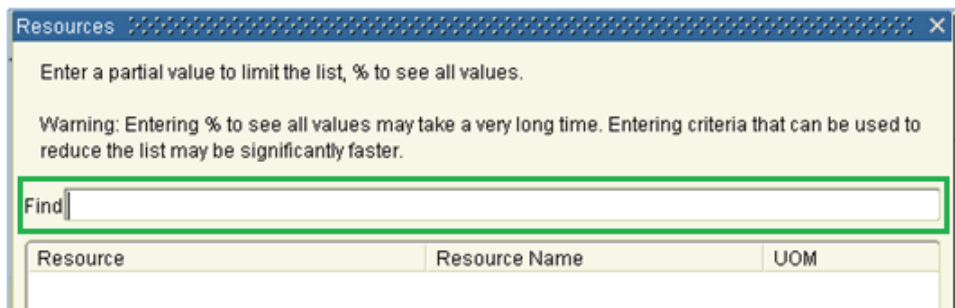
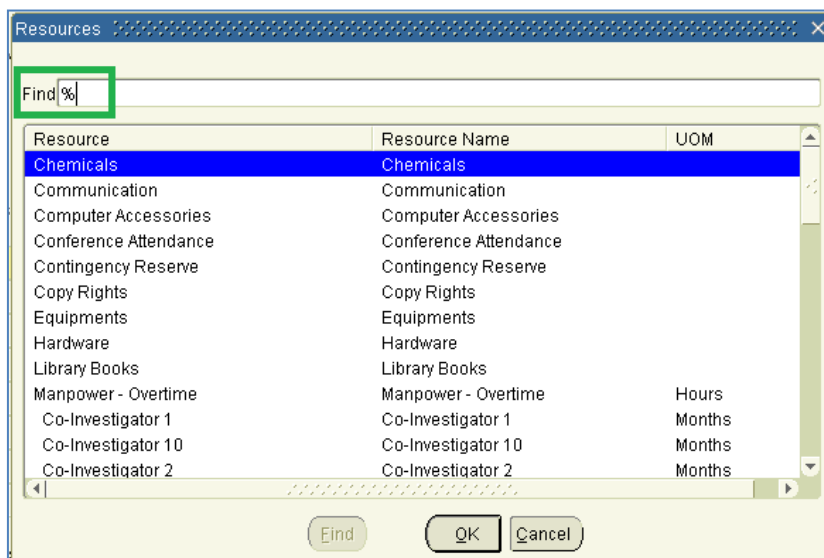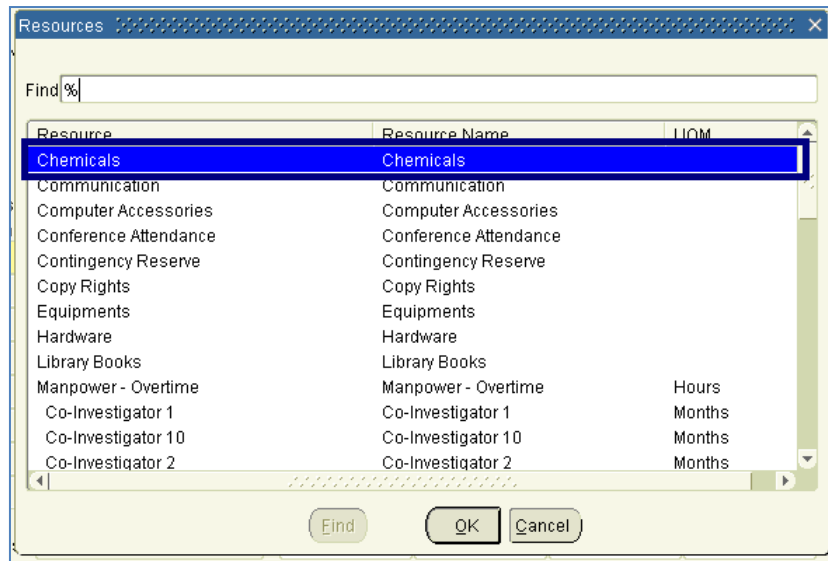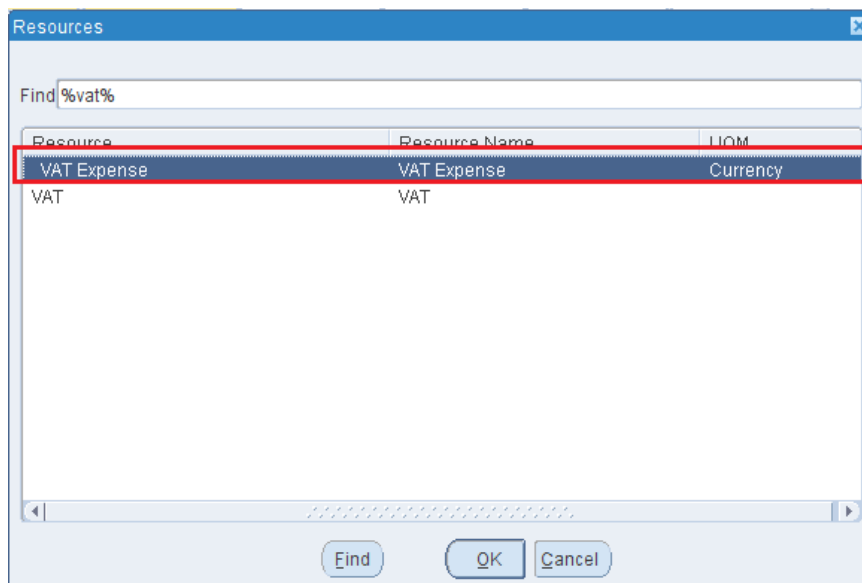**Figure 35: Procedure to locate the budget items on the resource list**

Figure 36: An overview of the budget items on the resource list

- **Step 1.2.12: Select the desired resource and it will be highlighted in blue (e.g. Chemicals is selected in Figure 37 A), and then click OK. In case of VAT kindly select "VAT Expense" Figure 37 B NOT "VAT" or "VAT Expense – DSR".**

(A)

(B)

Figure 37: Selecting the appropriate resource item from the list

- **Step 1.2.13: Click on the three dots (the red box in Figure 38), and a new window opens. From the available entries, select Amount Type as "Raw Cost" (the blue box) as shown in the Figure 38.**
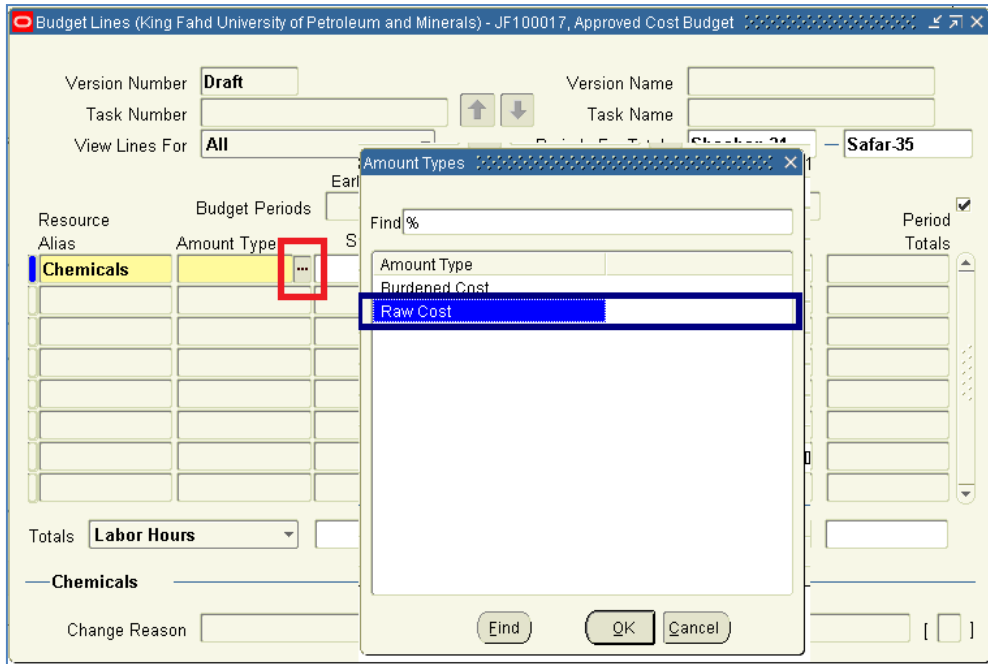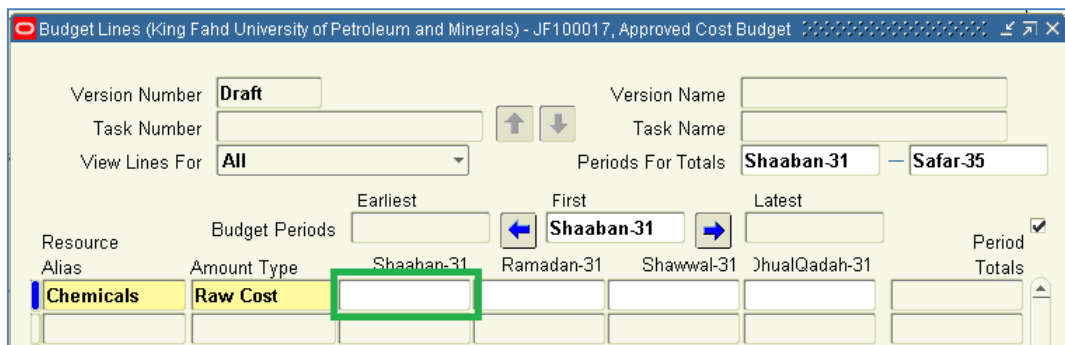
Figure 38: Selecting the appropriate Type of Cost under Amount Type

- **Step 1.2.14:** **Enter the amount in the cell next** to the Amount Type **(the green box in Figure 48)** as shown in Figures 39(A) and 39(B).

(A)

(B)

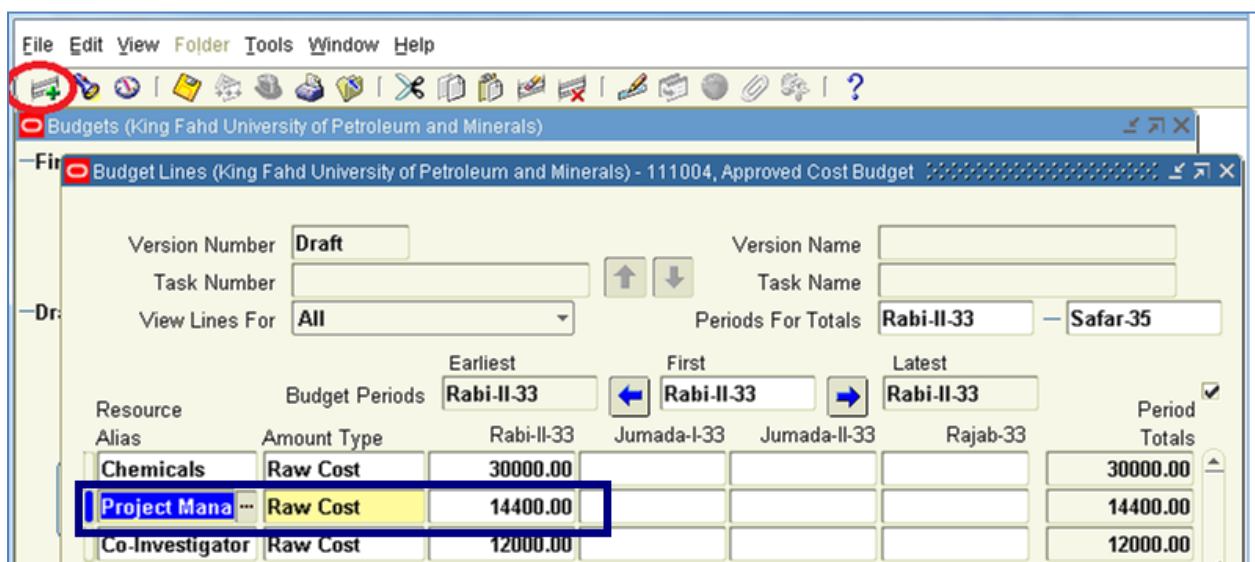**Figure 39: Entering the approved funds allocation against the resource item**

- **Step 1.2.15: Now move to the next row (the cells just below the filled-in ones) and repeat Steps 1.2.10 through 3.2.14 to enter the remaining budget items. A more comprehensive Figure of various entries is shown in the Figure 40.**

Figure 40: Comprehensive view of the budget items entered as per the approved budget

If all the budget lines are exhausted as shown in Figure 40 and the approved budget still have more items to be entered, new rows need to be added and the procedure is explained below.

- **Step 1.2.16: Select any completed cell (gets highlighted in blue) and then click the "Plus sign" (the red circle in Figure 41(A)) on the top-left corner as shown in Figure 41(A). A new row immediately after that selected row is added, as shown in Figure41(B) (the green box).**

(A)

Resource Alias	Amount Type	Earliest Budget Periods Rabi-II-33	← First Rabi-II-33 →	Latest Rabi-II-33			Period ✔ Totals
		Rabi-II-33	Jumada-I-33	Jumada-II-33	Rajab-33		
Chemicals	Raw Cost	30000.00					30000.00
Project Manage	Raw Cost	14400.00					14400.00
	...						
Co-Investigator	Raw Cost	12000.00					12000.00

(B)

Figure 41: Procedure to add new rows to the budget sheet

- **Step 1.2.17: Repeat Step 1.2.16 for adding more rows and then follow Step 1.2.10 through Step 1.2.14 to enter the data for the newly added budget item.**
- **Step 1.2.18: Once all approved items are entered in the budget lines, click the** <mark>Yellow Floppy Disk</mark> **(the red box) in the top Toolbar Menu to save the entries as shown in the Figure 42.**

The System will automatically calculate "Burdened Cost" (highlighted in blue in Figure 43) 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 43.

Figure 42: Procedure to save the budget lines entry

Figure 43: Comprehensive view of budget entry form after saving data

- **Step 1.2.19: Close the Budget Lines Window by clicking the "X" (the red circle) as shown in the Figure 43.**
- **Step 1.2.20: This takes you to the main Budget Window as shown in Figure 44. 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 44. Note: if the system gives you the error - DTVC Fee NOT as per RI Rules- please contact our office.**

Figure 44: Comprehensive view of Main budget entry form

Once Submitted, the Status of the budget (the green box) in Figure 44 changes from Working to Submitted shown in the Figure 45.

Figure 45: Reflecting the changes to the budget status

- **Step 1.2.21: 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 46). This takes you to the main Navigator Window as shown in Figure 47.**

Figure 46: Procedure to exit the Budget entry form to navigate to main window
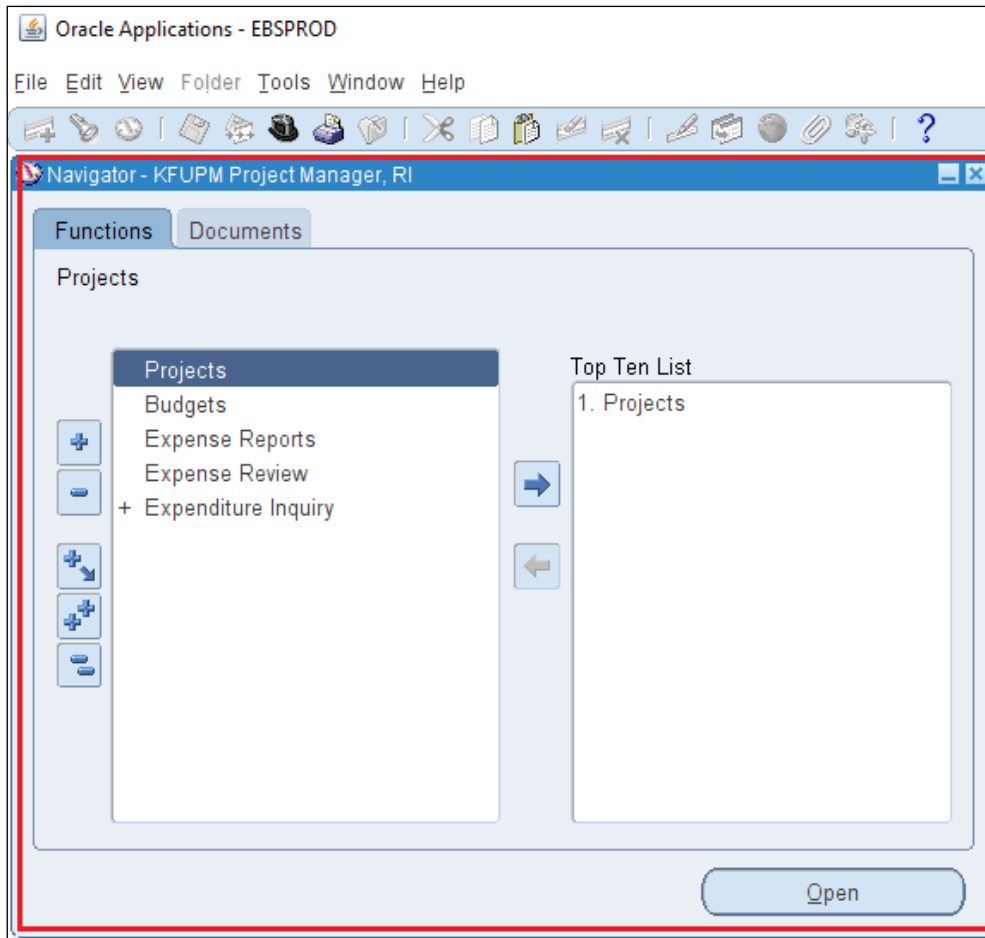
Figure 47: An overview of the Project Navigation Main Window

1.3.   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 1.4), no changes can be made to the project.

- **Step 1.3.1: After submitting the budget, budget status showing "Submitted" (the red box) as explained in Step 1.2.20 (See Figure 44), the view will appear as shown in Figure 48. In case budget modifications or rectifications are needed, click on "Rework" (the green box).**

Figure 48: 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 49 (A).

- **Step 1.3.2: 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 49 (A) and modify it. The changes are immediately reflected as shown in Figure 49 (B).**

(A)

(B)

**Figure 49: Procedure for modification or rectification of existing budget value**

- **Step 1.3.3: Once the changes are done, click the <mark>Yellow Floppy Disk</mark> (the red box) on the Top Menu to Save the entries as shown in the Figure 42.**

- **Step 1.3.4: Close the Budget Lines Window by clicking the "X" (the red circle) as shown in Figure 43.**

- **Step 1.3.5: 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 44.**

- **Step 1.3.6: 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 46. This takes you to the main navigator window as shown in Figure 47.**

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

1.4.　　　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 1.3.1: In the Main Navigator Window shown in Figure 50 (A), select "Projects"** (the blue box) **and click "Open"** (the green box).
- **Step 1.3.2: 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 50 (B).**
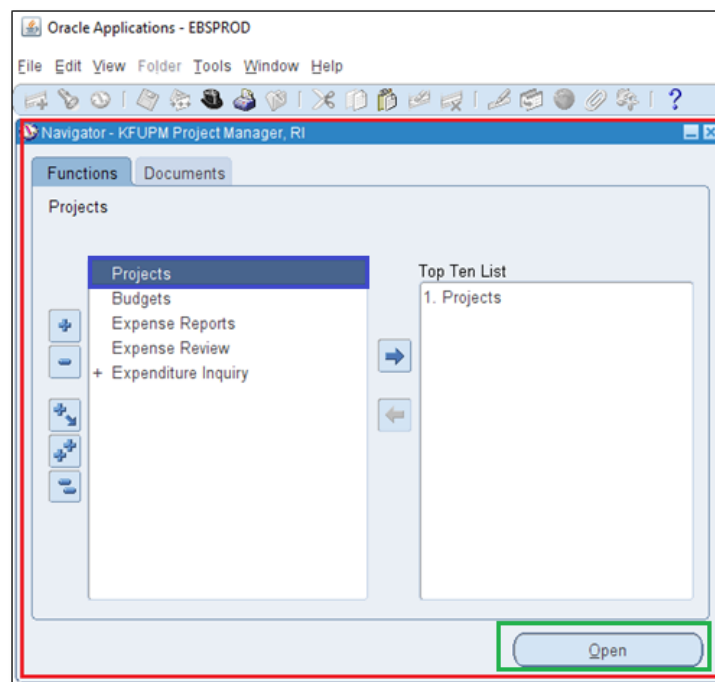
(A)
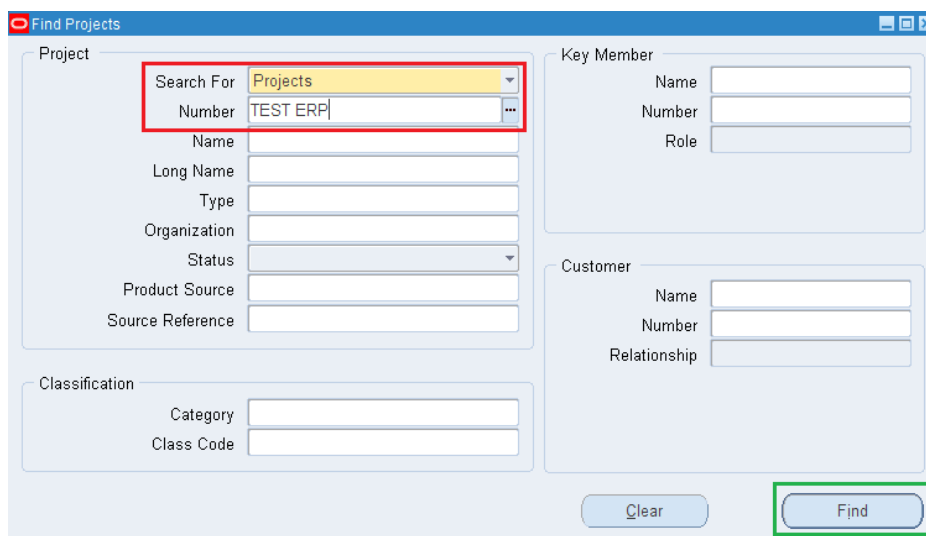
(B)

Figure 50: Procedure for opening a working project

- **Step 1.3.3: A new window open ups showing the working project. Select the project and click Open, as shown in Figure 51**
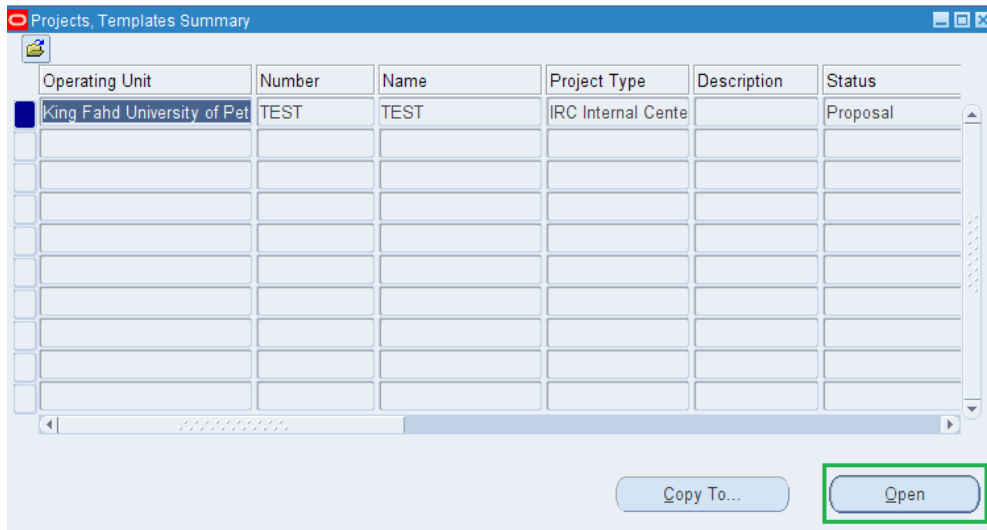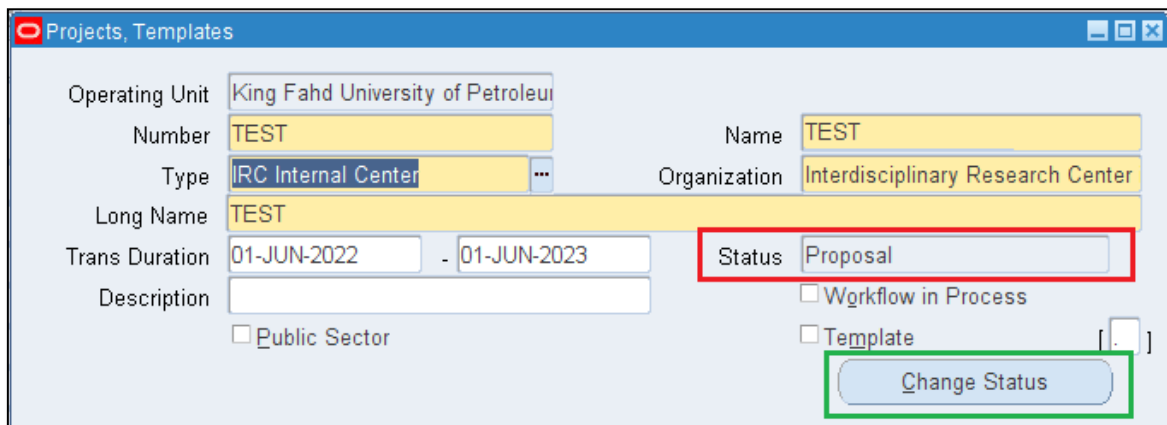

Figure 51: Procedure for opening a working project

- **Step 1.3.4: Initially the project status is "Proposal" (the red box) as shown in Figure 52. Click on "Change Status" (the green box), as shown in Figure 52, the status of project will be changed automatically. The proposal status, which has been so far appearing as "Proposal" (the red box) in earlier Figure 52 is now changed to "Submitted" as seen in the Figure53.**

(A)

Figure 52: Procedure for Changing the Status of working project

Figure 53: 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 Center Director for approval, before it can be accepted by the Deanship of Research Oversight and Coordination's Coordinator and activated.