

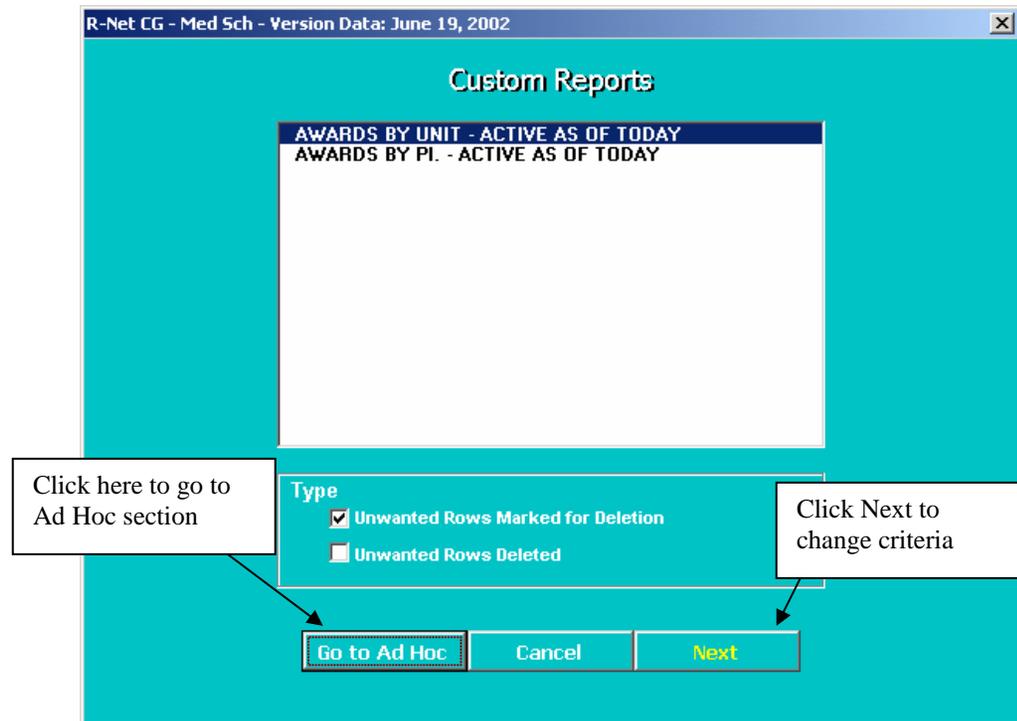
**David Geffen School of Medicine at UCLA
Dean's Office
R-Net/QDB Excel Front End**

This tool can be downloaded from <http://www.deans.medsch.ucla.edu/>, under Applications & Manuals, all Dean's Office QDB Applications. Make sure you download the "QDBCG.exe" file as well as "RnetQueries.exe", saved queries. You need a password to unzip these files.

Once you install the program and create the Add-In, in Excel, under Tools, you will see the option: "QDB/RNET Reporting". Click on it and log into QDB.

You will see the screen below.

This program has two main sections: Custom Reports and AdHoc. When you first start the program, it defaults to the "Custom Reports" section.



Custom Reports

This section contains the two most popular reports: Active Awards by Unit and Active Awards by PI. You can easily modify the criteria to run reports by dept, subdivision or Org. You can also choose specific Action Type, Activity Type or Sponsor Type.

In order to fine tune this information, we had to apply the following rules to the data after pulling it down from the R-Net database: First you extract the award rows with a project period end date greater than or equal to today. (you can change this date if you want) This will give you many lines that you don't want. For example if you are in the 4th year of a 5-year grant, you only want to see the information for the 4th yr. Or if there are rows with \$0, such as administrative change or modification/amendment, you don't want those either. Therefore, the following rule gets applied to this data:

The program looks at all rows with the same R-Net award number. It only keeps the rows that have the same or higher budget end date as the row with current data flag of "Y" (row with the highest sequence number). All other rows can get deleted. Rows with \$0 get deleted as well. In order to make sure that you agree with deleting the lines that this rule will delete, we have 2 versions of this report. One with "unwanted rows marked for deletion" and the other with "unwanted rows deleted". So you can run the first one to see if you agree with deleting marked rows and if you do, then you can run the 2nd version of the report.

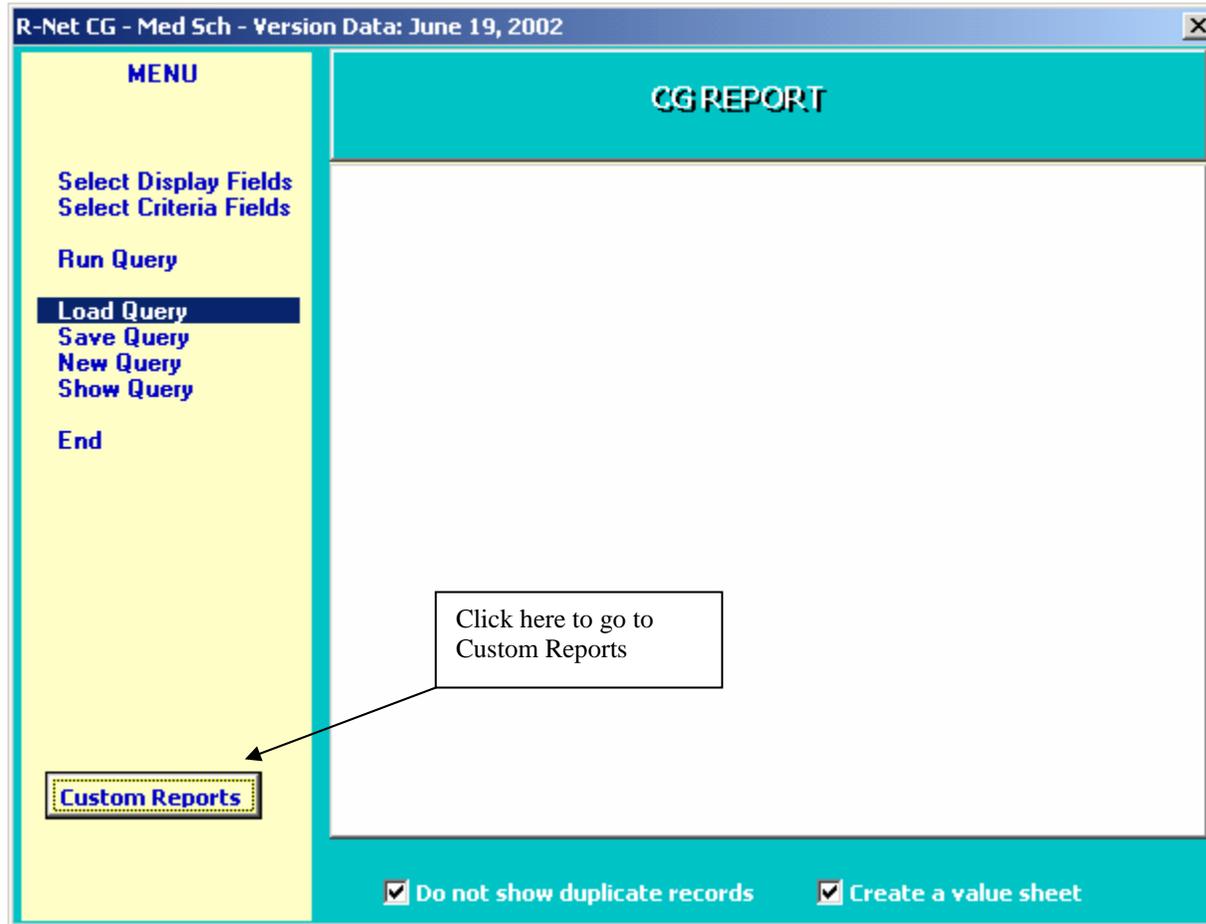
Changing Criteria in Custom Reports

Click "Next" to specify/change criteria. Click on any criteria in the left box that you wish to add or change. Make your selection from the list that will appear. Click OK and then click on the "Finish" button.

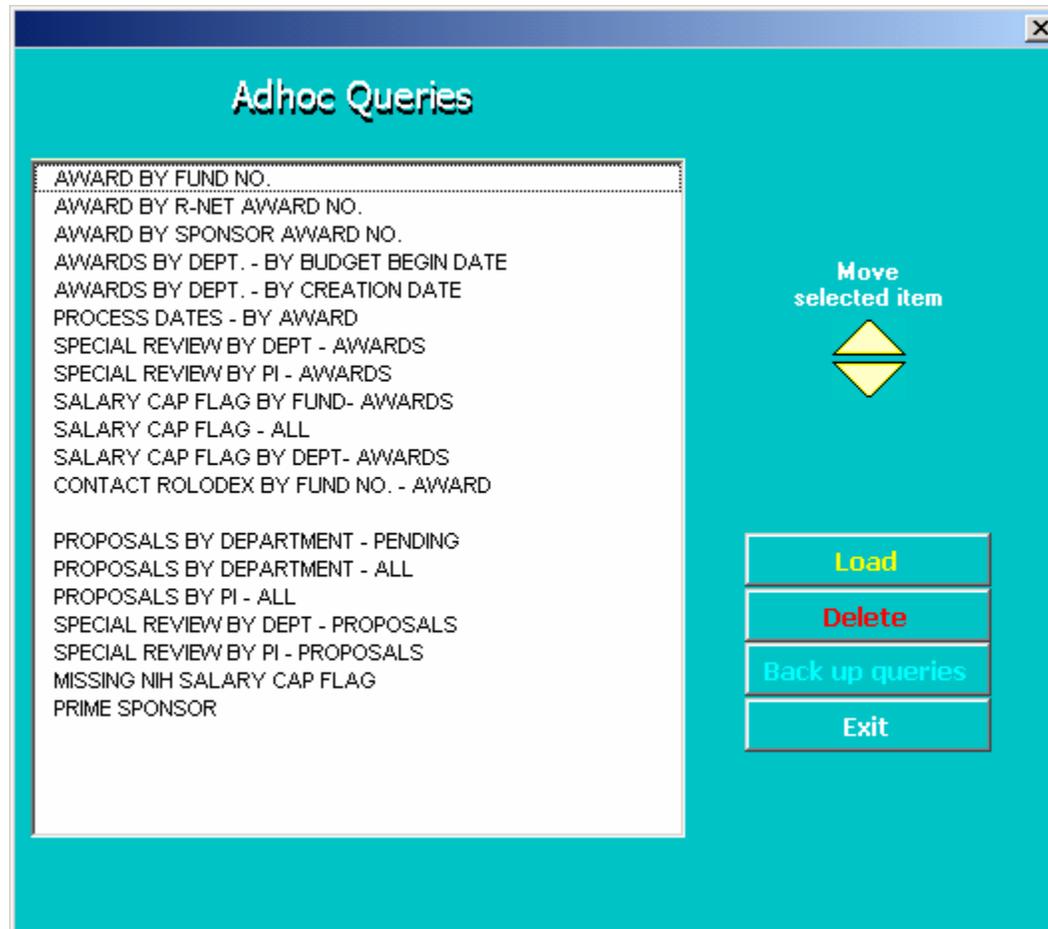
The screenshot shows a dialog box titled "Select Criteria Fields". It is divided into two main sections: "Criteria Fields" on the left and "Selected Criteria" on the right. The "Criteria Fields" section contains a list of available fields: Dept. Code, subdiv. code, Div. Code, Org. Code, Award Action Type, Award Activity Type, and Sponsor Type Code. The "Selected Criteria" section contains a list of selected criteria: Dept. Code equals ????, Project End is greater than or equal to 07/01/02, Loc. equals 4, and Prime PI equals Y. To the right of the "Selected Criteria" list is a "selected item" label, a yellow diamond-shaped arrow pointing down, and a "Delete" button. At the bottom of the dialog are four buttons: "Go to Ad Hoc", "Cancel", "Back", and "Finish".

Ad Hoc Section

To run an Ad-Hoc report, under Tools, click on “QDB/RNET Reporting”.
Click on the “Go to Ad Hoc” button. The following screen will appear.



Click on “Load Query”. The following list will show up. This is a list of the saved queries as part of the startup package. In a matter of seconds, you can modify the saved queries to better match your personal preferences. You can also create new queries.



To Load, Modify, Run and Save Existing Queries

- double click on the saved query that you want to run or single click on it and click “Load”.
- You will see a list of the fields that will be displayed in your report. Under “For the following criteria”, see the selected criteria.
- modify the criteria to match your needs by double clicking on the criteria you need to change and change it.
 - Click on “run Query”.
 - Once you get the results, it helps to use the Excel “Filtering” feature to more easily analyze your results. In the Excel menu, click on “data” - “filter” - “AutoFilter”. An arrow will appear at the top of each column which will allow you to view filtered data.
 - In addition to the data, you will get a sheet showing the explanation of the codes of certain fields. If you don’t want to get this sheet every time, you can turn it off by unclicking the “Create a value sheet” box at the bottom of the “Menu” screen.
 - You can rename the sheets by double-clicking on the sheet tab name and typing a different name
 - To save your revised query, containing your own criteria, under Tools, click on QDB/R-Net Reporting. The most recent query you ran will appear. Click on “Save Query”. If the query name looks fine, just click on “Save” and to the override question, say yes. If not, change the query name and then click on “Save”.

You can also add or delete display fields as you wish. If the saved query has some fields that you don’t need, after loading the query, simply click on “Display Fields”, highlight the field that you don’t want and click on “Delete”. To add a field, click on “Select Display Fields” to see a list of the groups of data. Choose the group you are interested in. A list of the related fields will be displayed for you to choose from by clicking on it. You can subsequently move these fields up or down or delete them as needed. When you are satisfied with your selections, save the query as described above.

To Create New Queries

To create any query, using any tool, you need to specify the fields you want to see in a report and you need to specify the criteria for narrowing down the search, i.e. dept. code and/or time period and/or Principal Investigator, etc. Sometimes you might use a field to specify certain criteria and also display the same field in your report.

To build a new query, in Excel, under Tools, click on QDB/R-Net Reporting. Then click on “New Query”.

- Click on “Select Display Fields” to see a list of the groups of data. Choose the group you are interested in. A list of the related fields will be displayed for you to choose from by clicking on it. You can move these fields up or down or delete them as needed.
- Click either on the “Menu” button and then “Select Criteria Fields” or click on the “Criteria” button to go straight to the criteria screen. You will see the list of the groups of data. Choose the group you are interested in. A list of the related fields will be displayed for you to choose from by clicking on it. Once you finish specifying your criteria, click on Menu, review the completed query to make sure the criteria is narrowing it enough either by department code and/or date and/or principal investigator or other so that you don’t get a run away query, due to accidentally trying to pull down too much data.

(If you switch back and forth between “criteria” and “display” screens, you can tell if you are in the criteria or display screens, by looking at the upper left corner of the screen.)

It is a good idea to save your query before running it, so that if it ends up being a run away query, and you end up exiting Excel, you don’t have to start over and build your query again. If that happens and you have saved your query, you can load it again and make modifications to improve it and save it and run it again.

To Save a Query

From the Menu screen, click on Save Query, give it a name and click “Save”.

Sample Saved Query

R-Net CG - Med Sch - Version Data: June 19, 2002

MENU

Select Display Fields
Select Criteria Fields

Run Query

Load Query
Save Query
New Query
Show Query

End

Custom Reports

AWARD BY FUND NO.

Display these fields on the report

- R-Net Award No.
- Seq.
- PI Name
- Dept. Title
- Award Action Type
- Sponsor Name
- Award Title
- Sponsor Award No.
- Award Status
- Award Creation Date
- Fund No.
- Budget Begin
- Budget End
- Current Direct \$
- Current Indirect \$
- Current Award \$
- Project Begin
- Project End
- Cumul. Award \$

For the following criteria
Fund No. equals ??????

Do not show duplicate records Create a value sheet

Remove this check mark if you don't need the value sheet