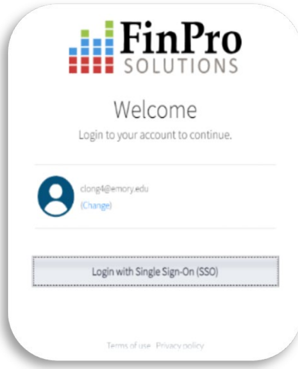
Web-based FORT Quick Start Guide

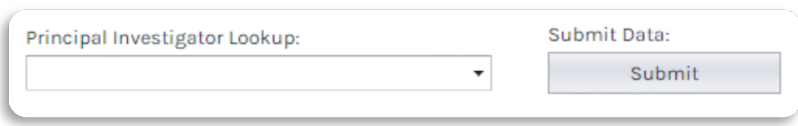
Accessing FORT and Logging In



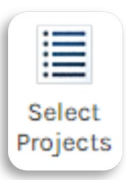
1. Open a web browser and navigate to **https://webapp.finprosolutions.com//**
2. Enter your NETID@emory.edu. Click **Continue**, then click **Login with Single Sign-On (SSO)**
3. Enter your Emory NetID and Password

Get Started Using the New FORT

1. Navigate to the Project Summary tab.
2. At the **bottom** of your browser window, use the Principal Investigator Lookup dropdown to select your Award PI, Project PI, or MPI.
    a. You can search by Employee ID or Name by typing in the dropdown box directly.
3. After selecting your PI, click Submit.

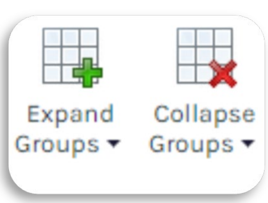


Opening Multiple Project/Activity Worksheets



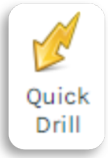
1. Users can now choose to open up to five (5) Project/Activity worksheets with a single click for a PI with the Select Projects button.
2. After the Project Summary page loads with the PI Portfolio, click the **Select Projects** button.
3. **Select up to five (5) Project/Activities** from the pop-up window and **Click Ok.**

Viewing Prior Year Data and Non-Personnel Expense Details



1. To view data for all prior project years, navigate to the Expand Groups button and choose Expand Column Groups.
    a. Collapse the columns using the Collapse Groups > Collapse Column Groups button.
2. To view details for all non-personnel expenses, navigate to the Expand Groups button and choose Expand Row Groups.
    a. Collapse the rows using the Collapse Groups > Collapse Row Groups button.

Drill to Transaction Details on Non-Personnel Expenses and Encumbrances



1. In the previous version of FORT, users could double click on the data cell they wished to drill on. In the new version, users must single click on the data cell, then click **Quick Drill** in the top menu.
2. Drills are still only available on the Non-Personnel Expenses and Encumbrances.

Uploading/Saving Data

1. Enter projections and notes on the **Project Detail worksheets**, the **Notes** tab, and/or the **Engagement Tracker**
2. Navigate to the **Upload & Save** button -> choose Current Sheet Only or All Sheets.
3. A Success message will appear if it has uploaded successfully.
4. **NEW timesaver for the web version of FORT**: Data refreshes automatically on the Project Summary and Award Summary pages after the user uploads projections on the Project Detail Worksheet.

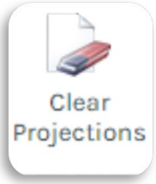
Downloading a Copy to an Excel file

1. You can download and save your workbook at any time.
   a. Please note: **All projections must be entered and uploaded in the web version**. No projections should be entered in the downloaded Excel document. They will not be uploaded to the database.
   b. Click ‘Download Copy’
   c. Choose your file type.
      i. Excel Workbook (*.xlsx) is recommended for most situations.
   d. Click “Download”
   e. Save to your preferred location on your local computer or shared drive(s)

Modifying the Workspace on the Project Detail page

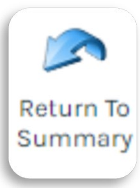
1. This option is available for users that may have single monitors or are working on a small monitor.
   a. This button works on the **project detail worksheets only.**
   b. After clicking the hyperlink to open a project detail worksheet, click the ‘Adjust Workspace’ button.
      i. After 1 click you will notice that there are fewer details appearing at the top left, and a few of the columns relating to HR distributions and fringe have been minimized.
      ii. After 2 clicks the details at the top are hidden entirely, and the budget column is also minimized.
      iii. At 3 clicks, you are back to where you started. None of the data is affected, just minimized. Only the viewing area of your screen is affected.
2. TIP: if the viewing area is still too small, try adjusting the zoom % in your browser.

Clearing Projections



1. **WARNING**: **CLICKING THIS BUTTON WILL CLEAR ALL PROJECTIONS ON THE WORKSHEET YOU ARE VIEWING**.
   a. The excel version of FORT had this as a button directly on the project detail worksheet.
   b. The web version of FORT shows this as a button in the ribbon.
2. This button was intended to be used when a new administrator takes over for a PI and wants to start fresh, or when your projections are no longer relevant, and you would like to start over.
   a. This clears out ALL projections, not just recently entered projections.
3. TIP: **If you Clear Projections by mistake, DO NOT UPLOAD**. Simply delete that Project Detail worksheet tab, reopen the worksheet and the original projections will be restored.

Return to Summary



1. This was just a small hyperlink on the top left of project detail worksheets in excel FORT
2. **NOW** since it appears in the top ribbon, you can navigate back to the project summary page from any page within the worksheet.