Quick Reference: Systems Startup

Getting an Account	**1.**	If you have not already been assigned a Penn State access account, contact your local system administrator.
	2.	Contact the appropriate research administrator for approval and then email SIMSAdmin@psu.edu.
	3.	After your account has been activated you will be informed by email.
Browser Settings For Internet Explorer 5.x:	**1.**	Start your Web browser.
	2.	Select Tools | Internet Options. The Internet Options window is displayed.
	3.	In the Internet Options window select the General tab and click on the Settings button.
	4.	In the Settings window select "Every visit to this page".
	5.	Click on OK. Then click on OK in the Internet Options window.
Browser Settings For Netscape Navigator:	**1.**	Start your Web browser.
	2.	Select Edit | Preferences … from the drop-down list.
	3.	In the Preferences window, click on the "+" to expand the Advanced category.
	4.	Click on the cache category.
	5.	Select the Every time option.
	6.	Click on OK.
Starting the System	**1.**	Start your Web browser.
	2.	Go to the ***SIMS*** site (http://www.sims.psu.edu). Click on the key to continue.
	3.	Type in your Access Account ID and Password. Click on "Log in."

Exiting the System	**1.**	On the upper left of your Welcome Screen, under the heading of Account, click on the link to "Logout."
Setting the Image Viewer	**1.**	Click on the document.
	2.	Image should open using an image viewer. If it doesn’t, a dialog box will open. Select an image viewer program to open and select OK. Contact your systems administrator if you no not have an image viewer installed on your PC.

Quick Reference: *SIMS* Welcome Screen

Changing Content	**1.**	Start ***SIMS.***
	2.	On your Welcome Screen, click on the link to Applications, then Personalize.
	3.	In the Page Content Builder window, select the content elements you want by checking the boxes.
	4.	Assign each selected content element to a screen.
	5.	Assign each selected content element an order to be displayed on the screen.
	6.	If desired, click the minimize box to the right.
	7.	Click on Continue.
	8.	Profile Manager screen displayed.
	9.	Click Exit
Sponsor Fact Sheet	**1.**	Click the icon next to the desired sponsor name.
	2.	Drill down by clicking the appropriate information or fact sheet links.
Faculty Fact Sheet	**1.**	Click the icon next to the desired faculty member.
	2.	Drill down by clicking the appropriate information or fact sheet links.
Award & Proposal Links	**1.**	Click the blue (hyperlinked) dollar values.
	2.	Drill down by clicking on other fact sheets or information links.

Quick Reference: Negotiation Manager

Accessing the Negotiation Manager	**1.**	On your Welcome Screen, click on Applications, then the Negotiation Manager link.
Exiting Negotiation Manager	**1.**	Click on Exit. The Negotiation Manager window is closed and you are returned to your Welcome Screen.
Selecting a Record	**1.**	On the Information page, select the record you are interested in from the record list. **OR** Use the "GO" button to locate the record by the log number. **OR** Use Quick Query to search using specific information
Accessing the History List	**1.**	Click on the History List Tab to receive a list of all relevant history for that Award Number.
Accessing the Contract Log/Award Statement	**1.**	Click on the paper icon to display the Contract Log (by log #) or Statement of Award (by OSP#).
Accessing the Activity Tab	**1.**	Click on the Activity tab.
e-Documents	**1.**	Click on the Document Tab
	2.	Click on the e-Document desired
	3.	The e-Document will appear on the screen.

Quick Reference: Proposal Manager

Accessing the Proposal Manager	**1.**	On your Welcome Screen, click on Applications, then the Proposal Manager link. **OR** Click the Proposal Link from the Negotiation Manager or Award Manager **OR** Click on the paper icon next to the OSP number in the upper left of the Proposal Statement
Exiting the Proposal Record	**1.**	Click on Exit. Proposal Manager window is closed and you are returned to your Welcome Screen.
Selecting a Proposal Record	**1.**	On the Information page, select the record you are interested in by using the “GO” button to search by OSP number. **OR** Use the Quick Query to search by specific information.
Accessing the Proposal Statement	**1.**	On the Information page, click on the Paper icon beside the OSP number and the relevant Proposal Statement is displayed.
Faculty Credit Distribution	**1.**	Click on the faculty credit tab. The faculty credit page will be displayed.
	2.	Click on report if you would like a printable report of all faculty credit.

Quick Reference: Award Manager

Accessing the Award Manager	**1.**	On your Welcome Screen, click on Applications, then the Award Manager link. **OR** Click “Award” from the Negotiation Manager or Proposal Manager
Selecting a Record	**1.**	On the Information page, select the record you are interested in by using the “GO” button, or Quick Query.
Exiting the Award Manager	**1.**	Click on Exit. Award Manager window is closed and you are returned to your Welcome Screen.
Accessing the Award Statement	**1.**	On the Information page, click on the Paper icon beside the OSP number and the relevant Award Statement is displayed.
Award Manager History List	**1.**	Click the History List tab on the information page.
	2.	Click any entry to view that entry **OR** Click the close button to keep the current record information.
Notes	**1.**	To access Award Notes, click “edit” beside the notes line.
Decrease in Funds	**1.**	On the information page, Decrease in Funds will be displayed at the bottom.
No Cost Extensions	**1.**	On the Information Page, No Cost Extensions will be displayed at the bottom.

Quick Reference: Quick Query

Using Quick Query—OSP/Award Number	**1.** Enter award or OSP number.
	2. Click Go!
	3. Award Statement appears.
	4. Print the report using the browsers print icon.
Using Quick Query—Keyword Search	**1.** Type in the keyword of the item you want to search on.
	2. Click Go! The list of available selections is displayed.
	3. Select the element you want to search on.
	4. Define search parameters
	5. Click on item.

Quick Reference: Custom Reports and Predefined Reports

Accessing the Custom Report Manager	**1.**	Click on the Edit button beside the Custom Report box.
Creating a New Custom Report	**1.**	Click on New.
	2.	Define report search parameters.
	3.	Click on Run.
	4.	If the report is as desired, click Update to save the report.
	5.	Click Exit to leave the custom report screen.
Editing a Custom Report	**1.**	Access Custom Report Manager. Select a report to edit from the drop-down list.
	2.	Click on Edit or Delete.
Using Predefined Reports	**1.**	Access the Custom Report Manager.
	2.	Click the Predefined Tab to display the page.
	3.	Click on New
	4.	Select a report class
	5.	Fill in Information blanks populated by Report Class choice
	6.	Name the report in the title field
	7.	Click on Update.
Running a Saved Custom or Predefined Report	**1.**	Select a previously saved report from the drop-down list on the Welcome Screen.
	2.	Click Go to generate the report
	3.	Print the report using the browser’s print icon.

Quick Reference: Accessing Document Imaging

From Negotiation Manager	**1.** Access the Negotiation Manager.
	2. Select record.
	3. Click “Documents” tab.
	4. A screen appears with all associated images.
	5. Click on the document you would like to see.
	6. Click “open this file from its current location.”
	7. The document appears.
From Award Statement	**1.** Access Award Statement.
	2. Click on “Documents” tab.
	3. Click on desired document.
	5. Click on the document you would like to see.
	6. Click “open this file from its current location.”
	7. The document appears.

Quick Reference: Personal Profile

Accessing Personal Profile	**1.**	On your Welcome Screen click on the link named Profile Manager.
Changing Personal Settings	**1.**	After accessing the Personal Profile, on the Personal tab page, click on Edit.
	2.	Modify your profile parameters.
	3.	Click on Update.
	4.	Click on Exit.
Changing Your Password	**1.**	Go to www.work.psu.edu and follow the instructions given on that page.

Quick Reference: Miscellaneous *SIMS* Procedures

Lookup Tool	**1.**	Type in the value you want to search on.
	2.	Click on the Magnifying Glass icon.
	3.	Select the value you want from the scrollable list.
	4.	The value is entered into the field.