



# Project Status Enquiry

You can review summary amounts and calculations by project, task, and resource using Project Status Inquiry (PSI). This screen is updated overnight only and does not include expenditures which have failed funds checking.

This function allows you to:

- Review the current status of your projects
- Drill down for more detailed review of a project and its tasks

**Responsibility:** GM Grants Administrator or GM Grants Investigator  
**Navigate:** Project Status → Task Status → Resource Status

## How to select projects

If you are using this screen with the GM Grants Investigator responsibility you will be able to view projects for which you are a key member.

1. Complete the **Number** field with the **project** number you wish to view.  
Click on the **Find** button.

2. The **project status** screen shows the total budget, expenditure, commitments and remaining funds available for the project.
3. Click on the **Task Status** button to view task-level summary amounts

Project	Project Name	Over Budget	Project Budget	Actual Cost to Date	Commitment to Date	Total Cost	Funds Available	Fin % Cmpl.
ZZA G/123	RG-12345		69,121.00	23,198.50	0.00	23,198.50	45,922.50	34

4. From here you can drill down to Commitments, Actuals and Resource Status.

**NB:** Click in the relevant Task line first. By clicking on this button it will display actuals and commitments by resource by task.

Task	Task Name	Over Budget	Task Budget	Actual Cost to Date	Commitment to Date	Total Cost	Funds Available
1	DIRECT COSTS		147,237.16	79,619.55	295.98	79,915.53	67,321.63
100	NON DIRECT C		202,416.84	192,379.63	0.00	192,379.63	10,037.21

Example of **Resource Status by Task:**

Resource	Resource Name	Over Budget	Resource Budget	Actual Cost to Date	Commitment to Date	Total Cost
EQUIPMENT	EQUIPMENT		2,500.00	0.00	0.00	
+ OTHER COSTS	OTHER COSTS *		8,700.00	9,866.31	295.98	10,162.29
+ STAFF COSTS	STAFF COSTS		127,037.16	65,129.22	0.00	65,129.22
+ TRAVEL AND SUBSIDIARIES	TRAVEL AND SUBSIDIARIES		9,000.00	4,624.02	0.00	4,624.02

Buttons: Events, Commitments, Actuals

**Project actuals and commitments**

**Commitments**

1. In the task status screen click on the **Resource Status** button to view the resources.
2. *Double click* on Resources that have "+" associated with the Resource. This opens up the list of resources. It is only possible to drill down from a resource.

Resource	Resource Name	Over Budget	Resource Budget	Actual Cost to Date	Commitment to Date	Total Cost
EQUIPMENT	EQUIPMENT		2,500.00	0.00	0.00	
- OTHER COSTS	OTHER COSTS *		8,700.00	9,866.31	295.98	10,162.29
Other Costs/Consumables	Other Costs/Consumables *		0.00	8,825.02	295.98	9,120.99
Other Costs/Miscellaneous	Other Costs/Miscellaneous *		0.00	1,041.29	0.00	1,041.29
+ STAFF COSTS	STAFF COSTS		127,037.16	65,129.22	0.00	65,129.22
+ TRAVEL AND SUBSIDIARIES	TRAVEL AND SUBSIDIARIES		9,000.00	4,624.02	0.00	4,624.02

Buttons: Events, Commitments, Actuals

3. To view project commitments, ensure you are in the lowest-level resource line and click on **Commitments**.
4. The **Find Commitments** screen displays. Enter search criteria for the search to be performed e.g. period, expenditure type or leave blank for a list of all commitments for that resource. Click on the **Find** button to view the list.

Ensure you are in the lowest level line

Resource	Resource Name	Over Budget	Resource Budget	Actual Cost to Date	Commitment to Date	Total Cost
EQUIPMENT	EQUIPMENT		2,500.00	0.00	0.00	
- OTHER COSTS	OTHER COSTS *		8,700.00	9,866.31	295.98	10,162.29
Other Costs/Consumables	Other Costs/Consumables *		0.00	8,825.02	295.98	9,120.99
Other Costs/Miscellaneous	Other Costs/Miscellaneous *		0.00	1,041.29	0.00	1,041.29
+ STAFF COSTS	STAFF COSTS		127,037.16	65,129.22	0.00	65,129.22
+ TRAVEL AND SUBSIDIARIES	TRAVEL AND SUBSIDIARIES		9,000.00	4,624.02	0.00	4,624.02

Find Commitments (Cambridge University) - PDAG/186, 1, Other Costs/Consumables

Supplier Name:  Supplier Number:   
 Expenditure Type:  Expenditure Organization:   
 Commitment Dates:  -  Commitment Type:

Buttons: Clear, Find

- The list of commitments will be displayed for that resource.

Supplier Name	Commitment Date	Commitment Type	Commitment Number	Quantity	UOM	Project Raw Cost	Project Burdened
UNIVERSITY COI	20-JUN-2012	Purchase Orders	1512845	0	EA	0.00	
UNIVERSITY COI	10-JUL-2012	Purchase Orders	1521810	0	EA	0.00	
UNIVERSITY COI	23-NOV-2012	Purchase Orders	1585068	0	EA	0.00	
UNIVERSITY COI	23-NOV-2012	Purchase Orders	1585068	0	EA	0.00	
UNIVERSITY COI	03-DEC-2012	Purchase Orders	1589781	0	EA	0.00	
UNIVERSITY COI	10-JUL-2012	Purchase Orders	1521810	0	EA	0.00	

## Actuals

- In the **task status** screen click on the **Resource Status** button to view the resources.
- To view a listing of posted expenditure: from the Resource Status screen, double click on resources that have "+" associated with the resource to open up the list. It is only possible to drill down from a resource. This functionality is not available for a resource group. Select the resource that you wish to view the actual expenditures for and click on the Actuals button.

Resource	Resource Name	Over Budget	Resource Budget	Actual Cost to Date	Commitment to Date	Total Cost
EQUIPMENT	EQUIPMENT		2,500.00	0.00	0.00	
- OTHER COSTS	OTHER COSTS *		8,700.00	9,866.31	295.98	10,162.29
Other Costs/Consumables	Other Costs/Consumables *		0.00	8,825.02	295.98	9,120.94
Other Costs/Miscellaneous	Other Costs/Miscellaneous *		0.00	1,041.29	0.00	1,041.29
+ STAFF COSTS	STAFF COSTS		127,037.16	65,129.22	0.00	65,129.22
+ TRAVEL AND SUBSIDIARIES	TRAVEL AND SUBSIDIARIES		9,000.00	4,624.02	0.00	4,624.02

Events    Commitments    Actuals

- The **Find** screen will open which is automatically populated with the current PA (project accounting) period.
- If you wish to view expenditures for more than the current period, change the PA period. Use the parameters to request specific expenditures if required.

PA Periods: SEP-12 - SEP-13

Employee Name: \_\_\_\_\_ Employee Number: \_\_\_\_\_  
 Supplier Name: \_\_\_\_\_ Supplier Number: \_\_\_\_\_  
 Organization: \_\_\_\_\_ Job Name: \_\_\_\_\_  
 Expenditure Type: \_\_\_\_\_ Non-Labor Resource: \_\_\_\_\_  
 Non-Labor Resource Org: \_\_\_\_\_

Clear    Find

- Click on the **Find** button to view the **Expenditure Item Details** screen.

Expenditure Type	Expenditure Item Date	Employee/Supplier Name	Quantity	UOM
Other Costs/Consumables	08-JAN-2013	DHL INTERNATIONAL (UK)	6.57	Pounds
Other Costs/Consumables	08-JAN-2013	DHL INTERNATIONAL (UK)	0	Pounds
Other Costs/Consumables	24-FEB-2013		6.87	Pounds
Other Costs/Consumables	24-FEB-2013		6.6	Pounds
Other Costs/Consumables	27-FEB-2013	XMA LTD	64.61	Pounds
Other Costs/Consumables	27-FEB-2013	XMA LTD	60.68	Pounds
Other Costs/Consumables	27-FEB-2013	XMA LTD	60.68	Pounds
Other Costs/Consumables	27-FEB-2013	XMA LTD	0	Pounds

AP Invoice

- Click on the **AP Invoice** button to view the **invoice overview** screen for the expenditure line selected if required.