

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

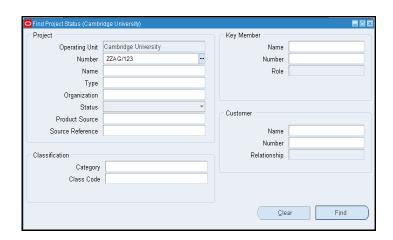
Responsibility: GM Grants Administrator or GM Grants Investigator Navigate: Project Status → Task Status → Resource Status

How to select projects

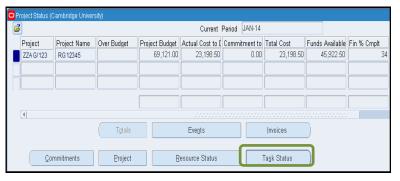
If you are using this screen with the GM Grants Investigator responsibility you will be able to view projects for which you are a key member.

Complete the *Number* field with the *project* number you wish to view.

Click on the Find button.

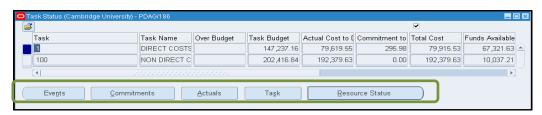


- The project status screen shows the total budget, expenditure, commitments and remaining funds available for the project.
- 3. Click on the **Task Status** button to view task-level summary amounts

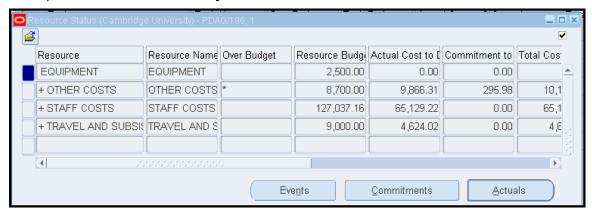


4. From here you can drill down to Commitments, Actuals and Resource Status.

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



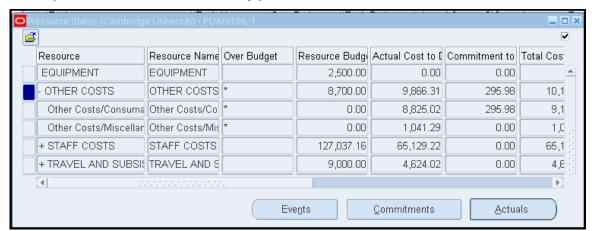
Example of Resource Status by Task:



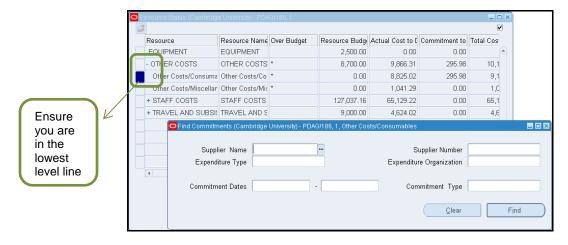
Project actuals and commitments

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.



- 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.

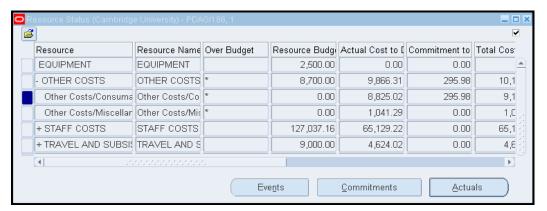


5. The list of commitments will be displayed for that resource.

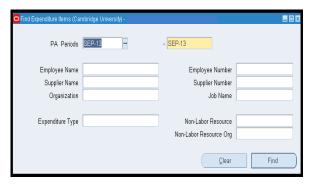


Actuals

- 1. In the *task status* screen click on the *Resource Status* button to view the resources.
- 2. 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. lit 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.



- 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.



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



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