

Run and Review the Project Summary Inquiry

Use these instructions to run and review the Project Summary Inquiry (RFPSI).

Prerequisites

- You must have one of the following responsibilities to run and review the Project Summary Inquiry (RFPSI):
 - You must be a KEY Member
 - Anyone who can access the Navigator Path
- Be sure the following information is already entered in the system:
 - A project, task, and award must exist in the Oracle application.
 - The project number must be known.

To run and review the Project Summary Inquiry (RFPSI):

- 1. Navigate to **Project Summary Inquiry**, click **Open** to display the **Find Projects** window.
- 2. Enter the Project Number.
- 3. Press the **Tab** key. The **Status**, **Last Run On**, and **Last Run By** fields automatically populate.



- 4. If the Status displays **Completed Normal** and the Last Run On field displays a current date, **click View**.
 - Project Summary Inquiry ORG Account Establishment Administrator @ TRANX 28-MAR-2019
 Project 1148520 Start 01_JUL-2018 End 30_JUN-2019 Shortages Current as of: 12/20/2018 08:37:28
 Egit Form
 Project Specifics
 Project Trile Collegiste Science and Technology Entry Program (CSTEP)
 Status APPROVED
 Principal Investigator Crump-Owens, Ms. Shanna I
 Organization 030 Center for Academic Development Services
- ► Find Projects
 ■ ⊠

 Status:
 Completed-Normal

 Project Number:
 1148520

 Last Run On:
 12/20/2018 08:37:28

 Last Run By:
 030KOSTRADE

 Submit
 Befresh

 View

 Re-process ALL encumbrances and expenditures for the life of the project

- 5. If the Status displays **Never Run**, you must run the inquiry before you can view the information.
- 6. Click **Submit**, click **OK**. Click Refresh until status displays Completed-Normal.
- 7. Click View.

| Find Projects | |
|-------------------------------|--|
| | Status: Never Run |
| Project Number: 1134613 | Last Run On: Never Run |
| | Last Run By: Never Run |
| | |
| Submit | Refresh View |
| □ Re-process ALL encumbrances | and expenditures for the life of the project |

Note: Certain projects may take an extended period of time to run. While the RFPSI is being created or updated, you may select **File > Close Form** to return to the **Navigator** window and go on with other Oracle work. When you are ready to return and view the RFPSI, begin this procedure again.

The **Project Summary Inquiry** window displays.

- 8. Review the Project Specifics, a summary of information including the project's title, status, the name of the Principal Investigator, and the organization responsible for the project and its tasks.
- Note: Click the down arrow to open a dropdown menu that allows you access to



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the alternate regions other than Project Specifics. Other alternate regions providing information are Awards and Tasks.

 If you need to view project-level details by Award, go to the Project Summary Inquiry (Awards) window. Click Awards, click Select an Award. Choose the Award, click Award Details.

| Award | ls 🔹 | | | | |
|------------------|-----------------|---------------|------------------------|---|--|
| Awards Award: | 72160 | CS, Crump-Own | Award Details Tasks | - | |
| | Select an award | | | , | |

| ct Summary Inquiry - OR | RG Account Establishr | ment Administrat | tor @ TRAINX - 28- | MAR-2019 | | | |
|---|--|------------------|--------------------|--------------|-------------|-------------|----------------|
| ect 1134613 | Start 01-JUL-2016 | End 31-DEC-2 | 2018 Chortage | s Current | as of: 03/2 | B/2019 10:5 | i 1: 33 |
| | | | | | E | xit Form | |
| | | | | | _ | | |
| | | | | | | | |
| Project Specifics | | | | | | | |
| Project Specifics Project Specifics | | | | | | | |
| Project Specifics Project Title | Collins: Acute Inter | mittent Hypoxia | a and Bladder Fur | iction in PD | | | |
| Project Specifics Project Specifics Project Title Status | Collins: Acute Inter APPROVED | mittent Hypoxia | a and Bladder Fur | ction in PD | | | |
| Project Specifics Project Specifics Project Title Status Principal Investigator | Collins: Acute Inter APPROVED Collins, Dr. William | mittent Hypoxia | a and Bladder Fur | ction in PD | | | |

| Awards | | - | | |
|--------|---------------|--------------|-----------------------------|---|
| | | Awards | | × |
| Awards | | | | |
| | | Find % | | |
| Award: | | Award Number | Award Name | |
| | | All | All awards for this project | |
| | | 72159 | Crump-Owens, S. | |
| Se | lect an award | 72160 | CS, Crump-Ownes | |
| | | | | |
| | | | | |
| | | | | |
| | | C41 | | |
| | | | | |
| | | | Eind QK Cancel | |
| | | ` | | |

The Project Summary Award Detail window displays.

11. **Review** the budgeted expenditures, actual costs, encumbrances, and available funding for the project.

Note: BC Level indicates the Budgetary Control at the Expenditure Category (Resource Group) level. The Burden Structure field displays the base for calculation of indirect costs, and the Burden Rate shows the indirect cost (that is, F&A, Agency Fee Rate) for the award that funds this project.

 To drill down for more information on an Expenditure Category, click the blue box on the Expenditure Category.

| Project | 1149520 | Start 01 1 | LIL 2019 Fr | | Shortages | Current as of: | 12/20/2019 09.27.29 |
|-----------------|---------------------------------|------------------------|-----------------------------------|-----------------------|------------------|----------------------|---------------------|
| , | 1140320 | 01-0 | UL-2010 - | 50-5014-2019 | Cononages | Current as of. | 12/20/2016 06:57:26 |
| Award | 72160 | Burden S | tructure MTI | DC Base | Print | Exit Form | Back to Award List |
| | | Burd | len Rate .08 | | | | |
| | Award Buc | igetary Control L | _evel Non | e | | | |
| _ | un en eliterre | Catanan | | Dudaat | 0 atrual | En europe en e | l Queilable |
| | Shara Sal an | d ER | MIX | Budget | 24 367 02 | 17 217 70 | |
| Cost | Share OTDS | u D | MIX | 43,290.00 | 1 9/9 36 | 00 | 66 663 64 |
| Tot | al Other- | | | 111 000 00 | 26 316 38 | 17 217 79 | 68 374 83 |
| | TAL Direct Co | ete | 1 | 111,909,00 | 26,316,38 | 17 217 79 | 68 374 83 |
| | | 313 | 1 | 111 909 00 | 26,316,38 | 17 217 79 | 68 374 83 |
| | | | 1 | | 20,010.00 | | 68 374 83 |
| | | | | | | | |
| PA | YROLL ENC | SHORT | 1 | | | .00 | |
| PA | YROLL FB S | HORT | | ii | | .00 | |
| Summa | AYROLL FB S ary Inquiry - Of | HORT RG Account Est | ablishment A | dministrator @ TR4 | AINX - 28-MAR-20 | .00 | |
| 1148 | 520 | Start 01-JUL-2 | 2018 End | 30-JUN-2019 | Shortages (| Current as of: 1 | 2/20/2018 08:37:28 |
| | ure Category: | Cost Share Sa | al and FB | | | | Back |
| (penditi | | | | _ | | | |
| openditi ard | Task BC | Level E | openditure | туре | Budget | Actuals | Encumbrances |
| (penditi ard | Task BC | Level Ex | (penditure Cost Share S | e Type Sal Regular | Budget .00 | Actuals 14,996.93 | Encumbrances |

13. To view details of All awards that fund this project and its tasks, at the Awards window choose **All**.



| ct 1148520 Start 01 | -JUL-2018 End | 30-JUN-2019 | Shortages | Current as of: 1 | 2/20/2018 08:37:28 |
|---------------------------|---------------|-------------|------------------|------------------|--------------------|
| ward Budgetary Control L | evel None | (Prin | nt E <u>x</u> it | Form Back t | o Award List |
| Expenditure Category | BC Level | Budget | Actual | Encumbered | Available |
| alaries and Wages Regular | MIX | 128,891.00 | 71,881.55 | 57,009.48 | 03 |
| alaries and Wages Grad | MIX | 40,500.00 | 10,564.50 | 5,175.00 | 24,760.50 |
| Total Salaries and Wages | | 169,391.00 | 82,446.05 | 62,184.48 | 24,760.47 |
| ringe Benefits Regular | MIX | 51,556.00 | 28,752.62 | 22,803.78 | 40 |
| ringe Benefits Grad | MIX | 6,480.00 | 1,690.32 | 828.00 | 3,961.68 |
| Total Fringe Benefits | | 58,036.00 | 30,442.94 | 23,631.78 | 3,961.28 |
| ost Share Sal and FB | MIX | 43,296.00 | 24,367.02 | 17,217.79 | 1,711.19 |
| Cost Share OTPS | MIX | 68,613.00 | 1,949.36 | .00 | 66,663.64 |
| Supplies | MIX | 9,363.00 | 5,285.39 | .00 | 4,077.61 |
| ravel | MIX | 7,820.00 | 285.32 | .00 | 7,534.68 |
| Seneral Services | MIX | 3,108.00 | 2,845.00 | .00 | 263.00 |
| Other Expenses | MIX | 46,617.00 | 15,156.28 | .00 | 31,460.72 |
| Fellows and Part Support | MIX | 105,665.00 | 35,761.85 | .00 | 69,903.15 |
| Indistributed Budget | MIX | .00 | .00 | .00 | .00 |
| -Total Other | | 284,482.00 | 85,650.22 | 17,217.79 | 181,613.99 |
| -TOTAL Direct Costs | | 511,909.00 | 198,539.21 | 103,034.05 | 210,335.74 |
| -TOTAL | | 511,909.00 | 198,539,21 | 103.034.05 | 210.335.74 |

14. Click Award Details.

15. To view Task Details, choose **Tasks, Select a Task**, choose the **Task Number**, click **OK**.



16. Click Task Details to display the Task Detail window.

| Project Summary Inquiry - ORG Acco | unt Establishmei | nt Administrator @` | TRAINX - 28-MAF | R-2019 | |
|------------------------------------|------------------|---------------------|-----------------|----------------|---------------------|
| Project 1148520 Start 01 | -JUL-2018 En | id 30-JUN-2019 | Shortages | Current as of: | 12/20/2018 08:37:28 |
| ask 15 Task Manag | er Crump-Ower | ns, Ms. Shanna I | Print | Exit Form E | Back to Task List |
| Start 01-JUL-2018 End 30-JU | V-2019 Struct | ture O/R | Rat | e O/R | |
| Task Budgetary C | ontrol Level | None | | | |
| Expenditure Category | BC Level | Budget | Actual | Encumbered | Available |
| Salaries and Wages Regular | Absolute | 80,990.00 | 45,167.50 | 35,822.50 | .00 |
| Total Salaries and Wages | | 80,990.00 | 45,167.50 | 35,822.50 | .00 |
| Fringe Benefits Regular | Absolute | 32,396.00 | 18,067.00 | 14,329.00 | .00 |
| Total Fringe Benefits | | 32,396.00 | 18,067.00 | 14,329.00 | .00 |
| TOTAL Direct Costs | i T | 113,386.00 | 63,234.50 | 50,151.50 | .00 |
| TOTAL | | 113,386.00 | 63,234.50 | 50,151.50 | .00 |
| - GMS BALANCES | i i | | | | .00 |
| | Î Î | | | | |
| PAYROLL ENC SHORT | i T | | | .00 | |
| PAYROLL FB SHORT | | | | .00 | |

At any point, you can click the **Print** button to print the form that is on display.

17. To Exit and return to the Navigator, click Exit Form.

Run and Review the Project Summary Inquiry Revised 22-Jul-2019