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**.

![Image showing a screenshot of the Project Summary Inquiry page with fields for Project Number, Status, Last Run On, and Last Run By]

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**.

![Image showing a screenshot of the Find Projects window with fields for Project Number, Status, Last Run On, Last Run By]

**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.

9. Note: Click the down arrow to open a drop-down menu that allows you access to the alternate regions other than Project Specifics. Other alternate regions providing information are Awards and Tasks.

10. 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.
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.

12. To drill down for more information on an Expenditure Category, **click the blue box** on the Expenditure Category.
13. To view details of All awards that fund this project and its tasks, at the Awards window choose All.

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.

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**.