



Run and Review the Project Summary Inquiry

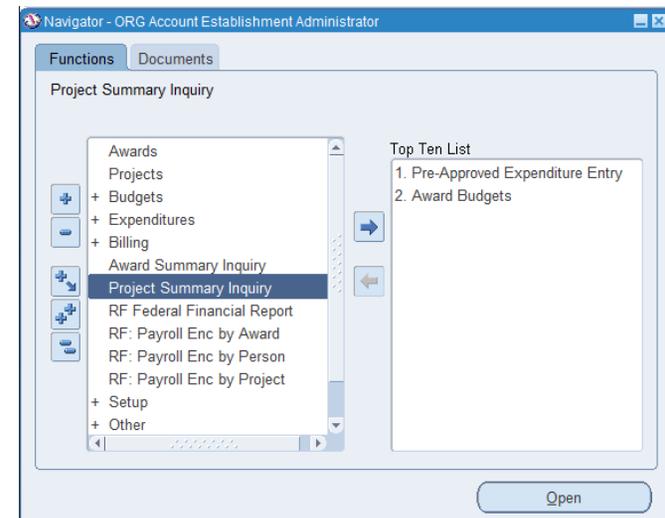
Use these instructions to run and review the Project Summary Inquiry (RFPSI).

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 @ TRAINX - 28-MAR-2019

Project: 1148520 Start: 01-JUL-2018 End: 30-JUN-2019 Shortages: Current as of: 12/20/2018 08:37:28

Exit Form

Project Specifics

Project Title: Collegiate 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 Refresh 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

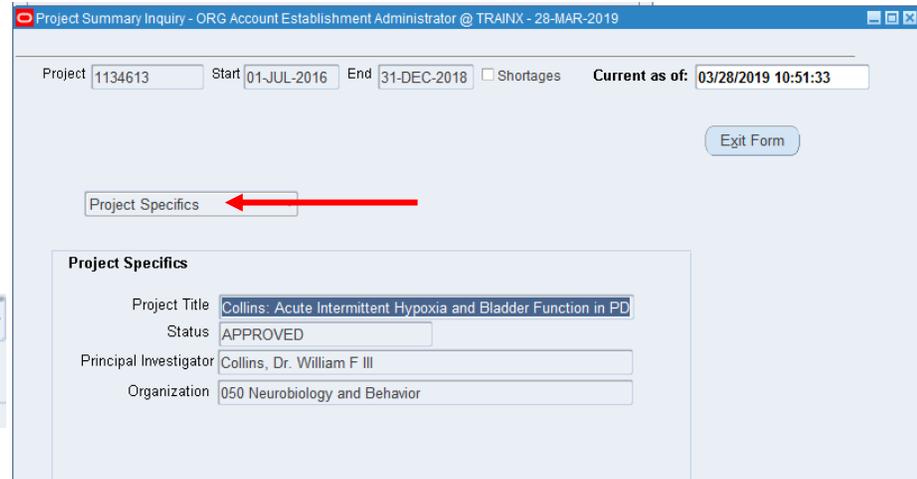
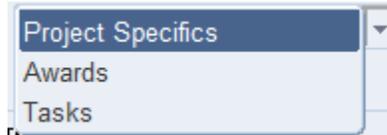
Re-process ALL encumbrances and expenditures for the life of the project

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.

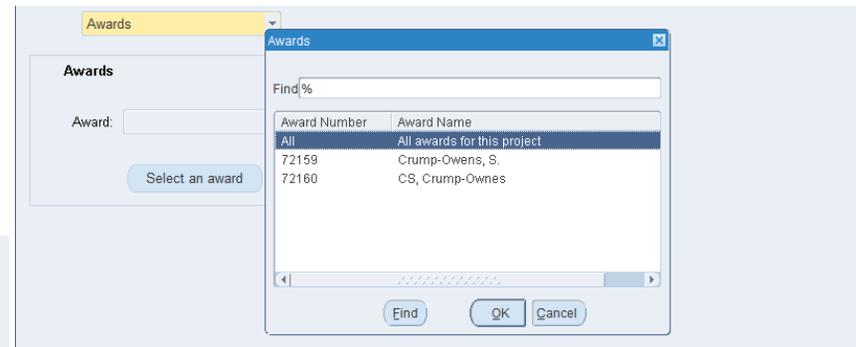
The **Project Summary Inquiry** window displays.

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.

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.

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Award: 72160 Burden Structure: MTDC Base Burden Rate: .08 Award Budgetary Control Level: None

Expenditure Category	BC Level	Budget	Actual	Encumbered	Available
Cost 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
--Total Other--		111,909.00	26,316.38	17,217.79	68,374.83
--TOTAL Direct Costs--		111,909.00	26,316.38	17,217.79	68,374.83
--TOTAL--		111,909.00	26,316.38	17,217.79	68,374.83
-- GMS BALANCES --					68,374.83
-- PAYROLL ENC SHORT --				.00	
-- PAYROLL FB SHORT --				.00	

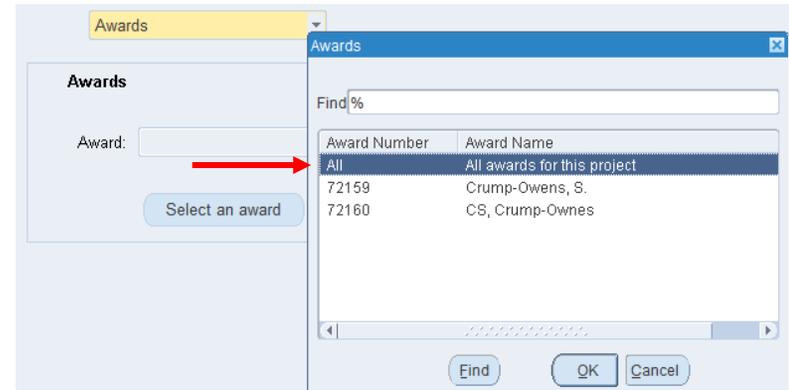
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Expenditure Category: Cost Share Sal and FB

Award	Task	BC Level	Expenditure Type	Budget	Actuals	Encumbrances
72160	CS	Absolute	CSS Cost Share Sal Regular	.00	14,996.93	10,596.87
72160	CS	Absolute	CSS Cost Share Fringe Benefits	.00	9,370.09	6,620.92

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



14. Click **Award Details**.

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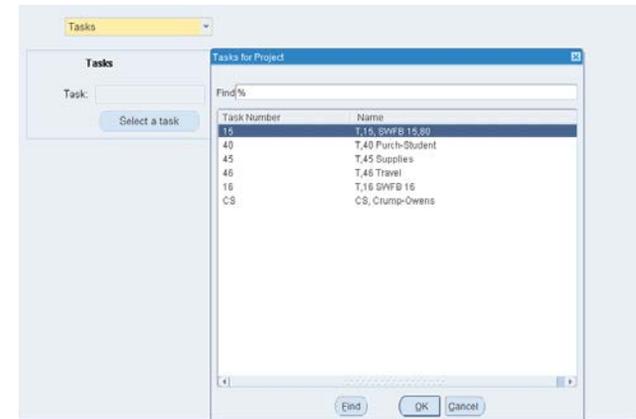
Project: 1148520 Start: 01-JUL-2018 End: 30-JUN-2019 Shortages: Current as of: 12/20/2018 08:37:28

Print Exit Form Back to Award List

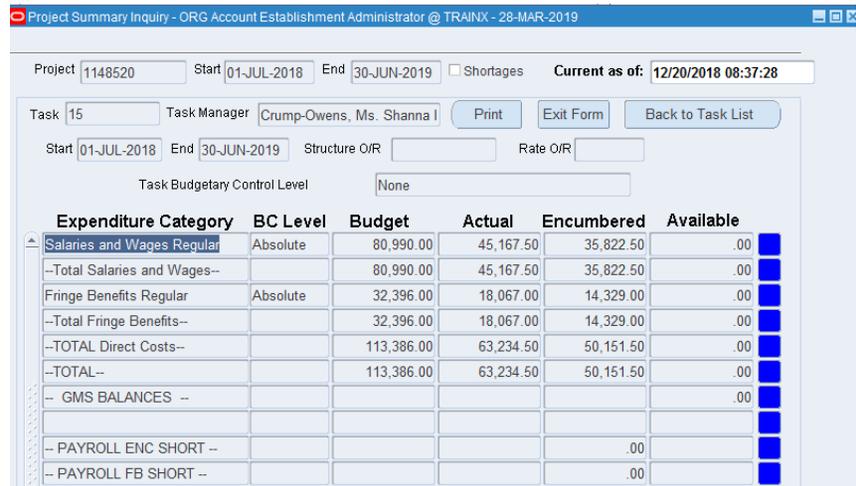
Award Budgetary Control Level: None

Expenditure Category	BC Level	Budget	Actual	Encumbered	Available
Salaries and Wages Regular	MIX	128,891.00	71,881.55	57,009.48	-03
Salaries 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
Fringe Benefits Regular	MIX	51,556.00	28,752.62	22,803.78	-40
Fringe 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
Cost 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
Travel	MIX	7,820.00	285.32	.00	7,534.68
General 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
Undistributed 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

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**.