## PROJECT SUMMARY REPORT

## NOTE: CLICK THE CANCEL BUTTON AT THE BOTTOM LEFT OF ANY PAGE TO GO BACK ONE PAGE

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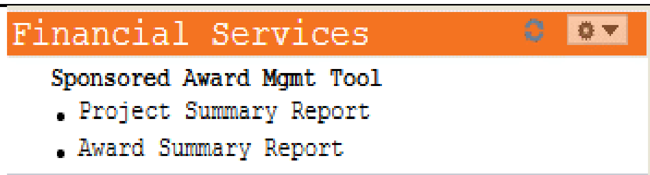
| From MySlice select Project Summary Report hyperlink in the Financial Services pagelet. |
|  |
| All of your active projects are listed in the Project Summary section. You may have to click View All to expand the page. **Note**: An indicator of 'FF' displays to the right of the Project ID when Forward Funded. Clicking on the FF hyperlink will display Forward Funded Detail. |
| Click Search. Total Project Expenses by Budget Category for all the Projects in the Project Summary will display in the Expense Detail grid. **Note**: the download icon on any grid exports the data in that grid to Excel. |
| Click the Cost Share tab in the Expense Detail grid. Total Cost Share by Budget Category for all the Projects in the Project Summary will display in the Expense Detail grid. |
| Change Project Status to Closed, click Search. All of your closed projects are listed in the Project Summary section and the Expense Detail totals update. |
| Click the Expand All icon in the Project Summary. Scroll to the right to see additional detail for each project. This detail can also be displayed by clicking the Details tab. |
| Click an Award Notes hyperlink (on the Details tab). Pre-audit notes that have been entered by OSA display. Click View All to see all Notes. |
| Select a filter (PI, Sponsor, Dept,etc.) then click Search. The Project Summary and Expense Detail grids re-populate with filtered data. |
| **DRILLING THROUGH CONTRACT, PROJECT, ACTIVITY** |
| Click Project Summary on the Menu at the top of the page, then click Search. |
| Review Burn Rate calculations and Indicator. Click the selection box next to Burn Rate Includes Commitments to recalculate the burn rates to include commitments. **Note**: Hover mouse over burn rates to view a pop-up with the calculation. |
| The number in parenthesis next to the Project ID indicates the number of activities associated with the Project. Click on a Project ID hyperlink. The Project Activity Summary will display associated activities and the Expense Detail grid relects total Project Expense or Cost Share by Budget Category for all projects displayed. |
| Click on an Activity ID hyperlink. The Activity Summary will display that Activity and the Expense Detail grid relects total Project Expense or Cost Share by Budget Category for that Activity displayed. |
| **DRILLING THROUGH BUDGET CATEGORY, ACCOUNT CODE, NAME** |
| Click Project Summary on the Menu at the top of the page, then click Search. |
| PAYROLL CATEGORY<br>If available, click Senior Personnel hyperlink or Other Personnel hyperlink (prefer one with Commits). A list of Budget Categories will display expenditures and related fringe and F&A. **Note**: If not available, skip the following (*) noted tasks. |
| *Click the Committed tab. A list of Budget Categories will display commits and related fringe and F&A. |
| *Click an Budget Category hyperlink to display list of account codes. **Note**: The tab reverts to Expended. To view Committed click the Committed tab or the Expand All icon. |
| *Click an Account Code hyperlink to display list of Names charged to that account code (if available -based on your payroll level security). |
| *Click a Name hyperlink (if available) to display transaction detail. |
| *Click Cancel until returned to Selected Budget Category Summary - Expenses page displaying Expenditure and related Fringe and F & A. |
| *Click Go To Budget Category by Month Summary hyperlink to view summary of project expenses by month. |
| *Click CS Sum by Month tab (at top of page) to view summary of cost share by month. |
| *Click Cancel |
| *Click Go To Budget Category by Month with Account Summary hyperlink to view summary of project expenses by month with account code. |
| *Click Cancel |

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| *Click Go To Budget Category by Employee Summary hyperlink to display list of Names charged to that budget category (if available -based on your payroll level security). |
| *Click an Emplid hyperlink, then Search. Select Job Record to view Appointment. **Note**: Access is based on HR security. |
| Click Project Summary on the Menu at the top of the page, then click Search. |
| PARTICIPANT COSTS CATEGORY<br>If available, Participant Costs hyperlink (prefer one with Commits). A list of Budget Categories will display expenditures and related fringe and F&A. **Note**: If not available, skip the following (**) noted tasks. |
| **Click an Expended Budget Category hyperlink to display list of account codes. |
| **Click an Account Code hyperlink to display list of Names charged to that account code. |
| **Click a Name hyperlink to display transaction detail. |
| **Click Cancel until returned to ***Selected Budget Category Summary*** page displaying Expended Budget Category and related F & A. |
| **Click Go To Budget Category by Month Summary hyperlink to view summary of project expenses by month. |
| **Click Go To Budget Category by Month with Account Summary hyperlink to view summary of project expenses by month with account code. |
| **Click Cancel. Click Cancel again. |
| **Click Go To Participant Costs by Name Summary hyperlink |
| **After reading the instructions provided on the page, Search for a participant |
| **Click an Expended Name hyperlink |
| **If transaction detail contains more than one Activity ID, populate Search by Activity ID box and Search |
| Click Project Summary on the Menu at the top of the page, then click Search. |
| Click any non-payroll or non-participant costs Budget Category hyperlink. |
| Click an Expended Budget Category hyperlink to display list of account codes. |
| Click an Account Code hyperlink to display list of Names charged to that account code. |
| Click a Name hyperlink to display transaction detail. |
| If available, click PO Number hyperlink to view PO Inquiry. |
| Click Cancel until returned to ***Selected Budget Category Summary*** page displaying Expenditure and related F & A. |
| Click Go To Budget Category by Month Summary hyperlink to view summary of project expenses by month. |
| Click Go To Budget Category by Month with Account Summary hyperlink to view summary of project expenses by month with account code. |
| **PROJECT SUMMARY FOR SELECTED DATE RANGE** |
| Click Project Summary on the Menu at the top of the page, then click Search. |
| Choose an active project with expenditures and enter the Project ID in the Project ID filter box. Click Search. |
| Click Project Summary-Date Search |
| Enter '2015' in the **Calendar Year** filter box, Click Search to display summary totals for January-December 2015. |
| Click Clear. |
| Enter 'FY15' in the **Fiscal Year** filter box, Click Search to display summary totals for July 2014-June 2015. |
| In **Calendar** section, enter From Month/Year '01 2015' and To Month/Year '8 2015' and click Search to display summary totals for January-August 2015. |
| Click Clear. |
| In **Fiscal** section, enter From Month/Year '01 FY15' and To Month/Year '6 FY15' and click Search to display summary totals for January-June 2015. |
| **PROJECT SUMMARY DETAIL** |
| Click Cancel. Click the Project ID hyperlink. |
| Click the Project Summary Detail hyperlink. |
| Click Create Adjustment Scenario button, then Add a New Value, then Add |
| Add a Title for Scenario 1 (Single line box) and a long description in the expandable box. |
| Add $2,000 to the Adjusted Budget Expense for Travel. Subtract $2,000 from the same column under Other Direct Costs. Click Apply, then click OK |

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| Click Create Adjustment Scenario. On Scenario 0 page Click the + button |
| Add a Title for Scenario 2 (Single line box) and a long description in the expandable box. |
| Add $3,000 to the Adjusted Budget Expense for Participant Costs. Subtract $3,000 from the same column under Equipment. Click Apply, then click OK |
| Click the Lookup icon next to the Select Scenario filter box. Click Lookup. Select 1. Review. Repeat to view Scenario 2. Review. |
| To remove Adjustment Scenarios- Click Create Adjustment Scenario, then View All. Click the minus sign on any scenario to |
| Click Cancel return to the Project Activity Summary page. |
| **PROJECT SUMMARY DETAIL BY PERIOD** |
| Click the Project Summary Detail by Period hyperlink. |
| Click the Lookup icon next to the Budget Period filter box. Click Lookup. Select a current or future dated budget period. |
| Click Create Adjustment Scenario button, then Add a New Value, then Add |
| Add a Title for Scenario 1 (Single line box) and a long description in the expandable box. |
| Add $4,000 to the Adjusted Budget Expense for Travel. Subtract $4,000 from the same column under Other Direct Costs. Click Apply, then click OK |
| Click Create Adjustment Scenario. On Scenario 0 page Click the + button |
| Add a Title for Scenario 2 (Single line box) and a long description in the expandable box. |
| Add $5,000 to the Adjusted Budget Expense for Participant Costs. Subtract $5,000 from the same column under Equipment. Click Apply, then click OK |
| Click the Lookup icon next to the Select Scenario filter box. Click Lookup. Select 1. Review. Repeat to view Scenario 2. Review. |
| To remove Adjustment Scenarios- Click Create Adjustment Scenario, then View All. Click the minus sign on any scenario to remove. |