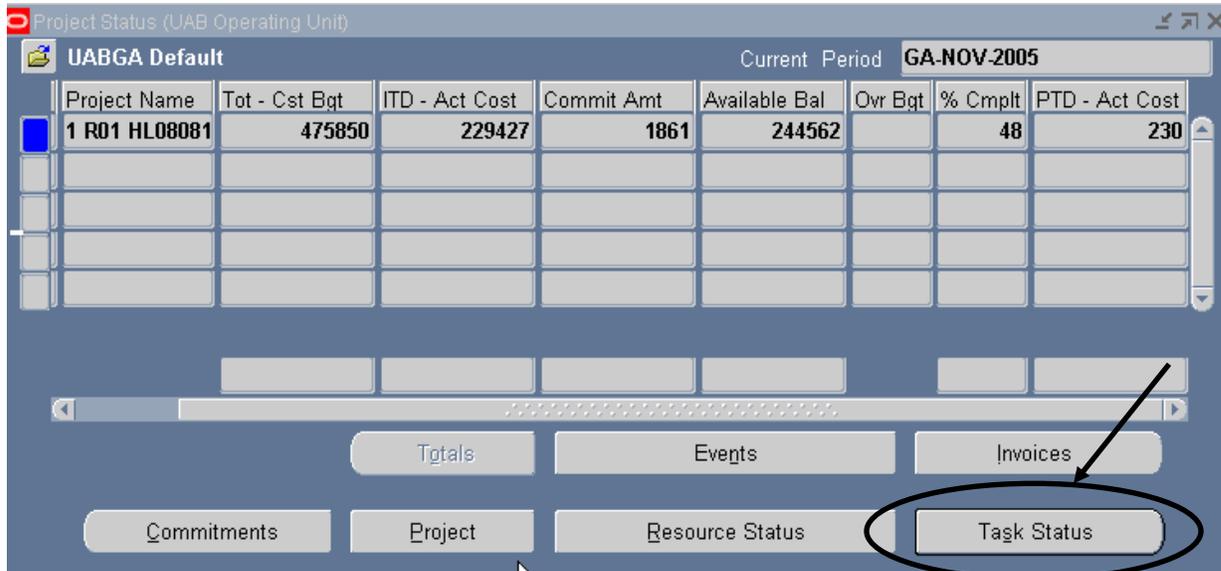


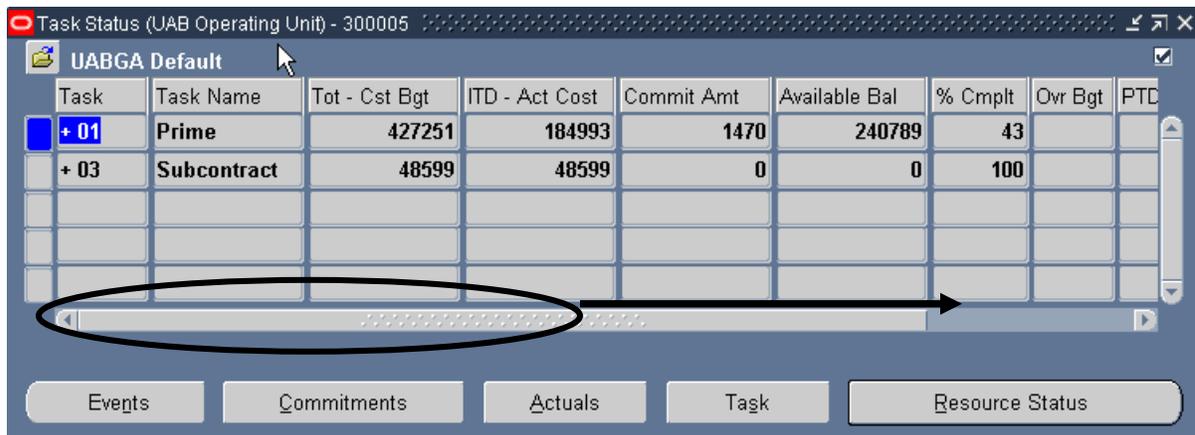
## UAB GA End User Project Status Inquiry Task Status

Detailed budget, actual, and commitment information can be reviewed by task by using the **TASK STATUS** button. Invoice detail can also be reviewed through this option.

1. From the **PROJECT STATUS** window, click on the **TASK STATUS** button.



This window contains an overview of information related to specific Tasks. To see more summary task status information for this project, scroll to the right using the scroll bar at the bottom of this window.



A description of the fields listed in the **TASK STATUS** window is detailed below.

## UAB GA End User Project Status Inquiry Task Status

<b>TASK</b>	Numbers (top- and sub-level) assigned to specific tasks within a project.
<b>TASK NAME</b>	Name tied to task number listed in previous field.
<b>TOT-CST BGT</b>	Total cost budget for all awards tied to the task.
<b>ITD-ACT COST</b>	Inception-to-date total amount of actual dollars spent on task.
<b>COMMIT AMT</b>	Total amount of commitments for task.
<b>AVAILABLE BAL</b>	Amount available to spend- Tot- Cost Bgt less ITD- Act Cost and Commit Amt
<b>% CMLPT</b>	Percent of task budget used.
<b>OVR BGT</b>	If a "*" appears in this field, indicates that spending for this task exceeds budgeted amount.
<b>PTD-ACT COST</b>	Period-to-date actuals spent for task.
<b>ORIG COST BUDGET</b>	Amount of original budget prior to any revisions or extensions.
<b>EVENTS (BUTTON)</b>	Not applicable.
<b>COMMITMENTS (BUTTON)</b>	Opens the Expenditure Item Details: Commitments window.
<b>ACTUALS (BUTTON)</b>	Opens the Expenditure Item Details: Actuals window.
<b>TASK (BUTTON)</b>	Opens the Task Information window.
<b>RESOURCE STATUS (BUTTON)</b>	Opens the Resource Status window.

To see more detail, expand the task numbers that have plus signs next to them.

- Once the summary of task status information has been reviewed, double click in any field in the **TASK** column to expand it.

Task	Task Name	Tot - Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpl	Ovr Bgt	PTD
+ 01	Prime	427251	184993	1470	240789	43		
+ 03	Subcontract	48599	48599	0	0	100		

## UAB GA End User Project Status Inquiry Task Status

- Click on a sub-task (so that the field is highlighted in bright blue) for which more information is desired, and click on the **TASK** button.

Task	Task Name	Tot - Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpl	Ovr Bgt	PTD
- 01	Prime	427251	184993	1470	240789	43		
01.01	1 R01 HL08081	427251	184993	1470	240789	43		
+ 03	Subcontract	48599	48599	0	0	100		

**Note:** Most attribute information related to a project is maintained at the Award level and is accessible through the [AWARD STATUS INQUIRY](#) function.

- This will open the **TASK INFORMATION** window. After reviewing this information, click once on the **X** in the top, right-hand corner of this window to return to the main **TASK STATUS** window.

Task Number: **01.01**

Task Name: **1 R01 HL080812-01**

Task Manager: **Deluca, Maria**

Organization: **379500000 Environmental Hea**

Service Type: **G: Other**

Location:

Active Date: **27-SEP-2004** - **31-AUG-2008**  Chargeable

Description: **1 R01 HL080812-01**

Product Source:

Source Reference:

A description of each field in the **TASK INFORMATION** window is detailed below.

## UAB GA End User Project Status Inquiry Task Status

<b>TASK NUMBER</b>	Number assigned to task within a specific project.
<b>TASK NAME</b>	Name tied to task number in previous field.
<b>TASK MANAGER</b>	Name of Principal Investigator.
<b>ORGANIZATION</b>	Organization associated with the task. This organization code maps to the Organization segment of the GL account string when mapping from GA to GL.
<b>SERVICE TYPE</b>	Options for grant accounts will be Other, Scope, or Subcontract.
<b>LOCATION</b>	Plant use, only.
<b>ACTIVE DATE</b>	Project begin date
-	Project end date
<b>CHARGEABLE</b>	Indicates that expenditures can be charged to this task.
<b>DESCRIPTION</b>	Task name
<b>PRODUCT SOURCE</b>	Not in use at UAB.
<b>SOURCE REFERENCE</b>	Not in use at UAB.

Once returned to the **TASK STATUS** window, click on the **COMMITMENTS** button.

Task	Task Name	Tot - Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpl	Ovr Bgt	PTD
- 01	Prime	427251	184993	1470	240789	43		
01.01	1 R01 HL08081.	427251	184993	1470	240789	43		
+ 03	Subcontract	48599	48599	0	0	100		

This will open the **FIND COMMITMENTS** window. Note that there are various criteria by which to search for specific commitments related to this project. Enter criteria here to narrow the list of commitments returned, or simply click on the **FIND** button to see all of the commitments related to this project.

5. After entering desired parameters, click on the **FIND** button.

A description of each field in the **FIND COMMITMENTS** window is detailed below.

## UAB GA End User Project Status Inquiry Task Status

<b>SUPPLIER NAME</b>	Vendor name.
<b>SUPPLIER NUMBER</b>	Vendor number.
<b>EXPENDITURE TYPE</b>	Object code.
<b>EXPENDITURE ORGANIZATION</b>	Organization associated with the commitment item.
<b>COMMITMENT DATES</b>	Starting date range of commitment items search.
-	Ending date range of commitment items search.
<b>COMMITMENT TYPE</b>	The document type initiated which incurred the commitment.
<b>CLEAR (BUTTON)</b>	Erases data from the fields.
<b>FIND (BUTTON)</b>	Searches for data based on parameters entered.

The type of information maintained in this window is equivalent to that maintained at the Award level and that can be accessed from the **PROJECT STATUS** window. However, remember that commitments viewed here are related only to this specific Task.

- To see more commitment detail information related to this task, scroll to the right using the scroll bar at the bottom of the window.

Task	Supplier Name	Commitment Date	Type	Commitment #	Expenditure Type	Amount	Description	Re
01.01	SIGMA ALDRIC	11-JUL-2005	Requisition	69357	8202099 SUPP-O	595.00	T2449-10ML, triglycerid	
01.01	SIGMA ALDRIC	11-JUL-2005	Requisition	69357	8202099 SUPP-O	260.00	F6428-40H, free glycerol	
01.01	SIGMA ALDRIC	11-JUL-2005	Requisition	69357	8202099 SUPP-O	112.50	F9252, folin-ciocalteu's	
01.01	SIGMA ALDRIC	11-JUL-2005	Requisition	69357	8202099 SUPP-O	352.00	GAG020-1KT, glucose (C	
01.01	STAPLES	08-JUL-2005	Requisition	69083	8202099 SUPP-O	150.15	TABLE-UTILITY STEEL 2	
01.01	FISHER SCIENT	19-AUG-2005	Purchase Orders	1077746	8202099 SUPP-O	98.52	117189 Dry Block Modul	
01.01	FISHER SCIENT	14-JUN-2005	Purchase Orders	1061412	8202099 SUPP-O	0.00	DISPENSER MULTI TAP 5	
01.01	FISHER SCIENT	14-JUN-2005	Purchase Orders	1061412	8202099 SUPP-O	0.00	NC-9137-987, regulator f	
01.01	FISHER SCIENT	22-SEP-2005	Supplier Invoice	7327171	8202099 SUPP-O	72.66	12 MM DRY BLOCK	
01.01	FISHER SCIENT	22-SEP-2005	Supplier Invoice	7327171	8202099 SUPP-O	217.98	12 MM DRY BLOCK	

A description of each field in the **COMMITMENT DETAILS** window is detailed below.

<b>TASK</b>	Task number to which specified commitment is tied.
<b>SUPPLIER NAME</b>	Vendor name.
<b>COMMITMENT DATE</b>	The date upon which the commitment was incurred.
<b>TYPE</b>	The document type initiated which incurred the commitment.
<b>COMMITMENT NUMBER</b>	The unique number assigned to the document listed in the previous field.
<b>EXPENDITURE TYPE</b>	Object code- indicates the nature of the transaction.
<b>QUANTITY</b>	Expenditure items quantity.
<b>AMOUNT</b>	Total amount requested on requisition or purchase order
<b>DESCRIPTION</b>	Pulled from the optional Description field on the requisition or PO.
<b>REQUESTOR</b>	The user submitting the PO requisition
<b>APPROVED</b>	Approval status of document incurring commitment.

## UAB GA End User Project Status Inquiry Task Status

It is possible to export this information to an Excel worksheet. Click [here](#) to learn how.

- Click once on the **X** in the top, right-hand corner of this window to return to the main **TASK STATUS** window.

Commitment Details (UAB Operating Unit) - 300005, 01.01

Type	Commitment #	Expenditure Type	Amount	Description	Requestor	Quantity	Approved
Requisition	69357	8202099 SUPP-O	595.00	T2449-10ML, triglycerid	Matlock, Sharor	10	<input type="checkbox"/>
Requisition	69357	8202099 SUPP-O	260.00	F6428-40H, free glycerol	Matlock, Sharor	5	<input type="checkbox"/>
Requisition	69357	8202099 SUPP-O	112.50	F9252, folin-ciocalteu's	Matlock, Sharor	1	<input type="checkbox"/>
Requisition	69357	8202099 SUPP-O	352.00	GAG020-1KT, glucose (C	Matlock, Sharor	10	<input type="checkbox"/>
Requisition	69083	8202099 SUPP-O	150.15	TABLE-UTILITY STEEL 2	Matlock, Sharor	1	<input type="checkbox"/>
Purchase Orders	1077746	8202099 SUPP-O	98.52	117189 Dry Block Modul		4	<input checked="" type="checkbox"/>
Purchase Orders	1061412	8202099 SUPP-O	0.00	DISPENSER MULTI TAP	Matlock, Sharor	1	<input checked="" type="checkbox"/>
Purchase Orders	1061412	8202099 SUPP-O	0.00	NC-9137-987, regulator 1	Matlock, Sharor	1	<input checked="" type="checkbox"/>
Supplier Invoice	7327171	8202099 SUPP-O	72.66	12 MM DRY BLOCK		1	<input type="checkbox"/>
Supplier Invoice	7327171	8202099 SUPP-O	217.98	12 MM DRY BLOCK		3	<input type="checkbox"/>

- Click on the **ACTUALS** button.

Task Status (UAB Operating Unit) - 300005

Task	Task Name	Tot - Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpmt	Ovr Bgt	PTD
- 01	Prime	427251	184993	1470	240789	43		
01.01	1 R01 HL08081	427251	184993	1470	240789	43		
+ 03	Subcontract	48599	48599	0	0	100		

Buttons: Events, Commitments, **Actuals**, Task, Resource Status

This will open the **FIND EXPENDITURE ITEMS** window. Note that there are various criteria by which to search for specific commitments related to this project. Enter criteria here to narrow the list of actual expenditures returned, or simply click on the **FIND** button to see all of the expenditures related to this project task for the **PA PERIODS** listed.

- Click once on the LOV button for the **PA PERIODS** field and select the Budget-DEC-2003 option.

## UAB GA End User Project Status Inquiry Task Status

The screenshot shows a software window titled "Find Expenditure Items (UAB Operating Unit) - 300005, 01.01". The interface includes a search form with the following fields and controls:

- PA Periods:** A dropdown menu currently showing "GA-DEC-2005".
- Employee Name:** A text input field.
- Supplier Name:** A text input field.
- Organization:** A text input field.
- Expenditure Type:** A text input field.
- Employee Number:** A text input field.
- Supplier Number:** A text input field.
- Job Name:** A text input field.
- Non-Labor Resource:** A text input field.
- Non-Labor Resource Org:** A text input field.
- Buttons:** "Clear" and "Find" buttons are located at the bottom right of the form.

A description of each field in the **FIND EXPENDITURE ITEMS** window is detailed below.

<b>PA PERIODS</b>	Starting date range of expenditure items search.
<b>-</b>	Ending date range of expenditure items search.
<b>EMPLOYEE NAME</b>	Name of individual vendor.
<b>EMPLOYEE NUMBER</b>	Employee ID number of individual vendor.
<b>SUPPLIER NAME</b>	Vendor name (non-employee).
<b>SUPPLIER NUMBER</b>	Vendor number (non-employee).
<b>ORGANIZATION</b>	Organization associated with the expenditure item.
<b>JOB NAME</b>	Not applicable.
<b>EXPENDITURE TYPE</b>	Object code.
<b>NON-LABOR RESOURCE</b>	Non-labor resource.
<b>NON-LABOR RESOURCE ORG</b>	Organization providing non-labor resource.
<b>CLEAR (BUTTON)</b>	Erases data from the fields.
<b>FIND (BUTTON)</b>	Searches for data based on parameters entered.

## UAB GA End User Project Status Inquiry Task Status

10. After entering desired parameters, click on the **FIND** button.

The type of information contained in this window is equivalent to that maintained at the Award level. However, remember that actual expenditures viewed here are related to one specific Task.

11. To see more actual expenditure detail information related to this task, scroll to the right using the scroll bar at the bottom of this window.

Exp Item Date	Expenditure Type	Employee/Supplier Name	Amount	Expenditure Batch	Expenditure Comment
30-NOV-2005	8102099 SAL-OTHER FACU	Ruden, Douglas M	-784.06	20179ST16332	A:Adjustments:11 2005
31-OCT-2005	8102099 SAL-OTHER FACU	Ruden, Douglas M	-783.95	20179ST16332	A:Adjustments:10 2005
30-SEP-2005	8102099 SAL-OTHER FACU	Ruden, Douglas M	-746.68	20179ST16332	A:Adjustments:9 2005
31-AUG-2005	8102099 SAL-OTHER FACU	Ruden, Douglas M	-782.24	20179ST16332	A:Adjustments:8 2005
29-JUL-2005	8102099 SAL-OTHER FACU	Ruden, Douglas M	-782.25	20179ST16332	A:Adjustments:7 2005
30-SEP-2005	8103020 SAL-PROF NONFA	Fu, Chuanhua	-227.94	20179ST16332	A:Adjustments:9 2005
31-AUG-2005	8103020 SAL-PROF NONFA	Fu, Chuanhua	-555.02	20179ST16332	A:Adjustments:8 2005
29-JUL-2005	8103020 SAL-PROF NONFA	Fu, Chuanhua	-555.04	20179ST16332	A:Adjustments:7 2005
30-NOV-2005	8191011 GRP A COMP FR E	CFB, Group A Do Not Del	-179.55	CFB-200512ST16340	CFB GROUP A-30-NOV-05
31-OCT-2005	8191011 GRP A COMP FR E	CFB, Group A Do Not Del	-179.52	CFB-200512ST16340	CFB GROUP A-31-OCT-05

A description of each field in the **EXPENDITURE ITEM DETAILS** window is detailed below.

<b>EXP ITEM DATE</b>	Date the expenditure was incurred.
<b>EXPENDITURE TYPE</b>	Object code number and description.
<b>EMPLOYEE/SUPPLIER NAME</b>	Vendor name (employee or non-employee).

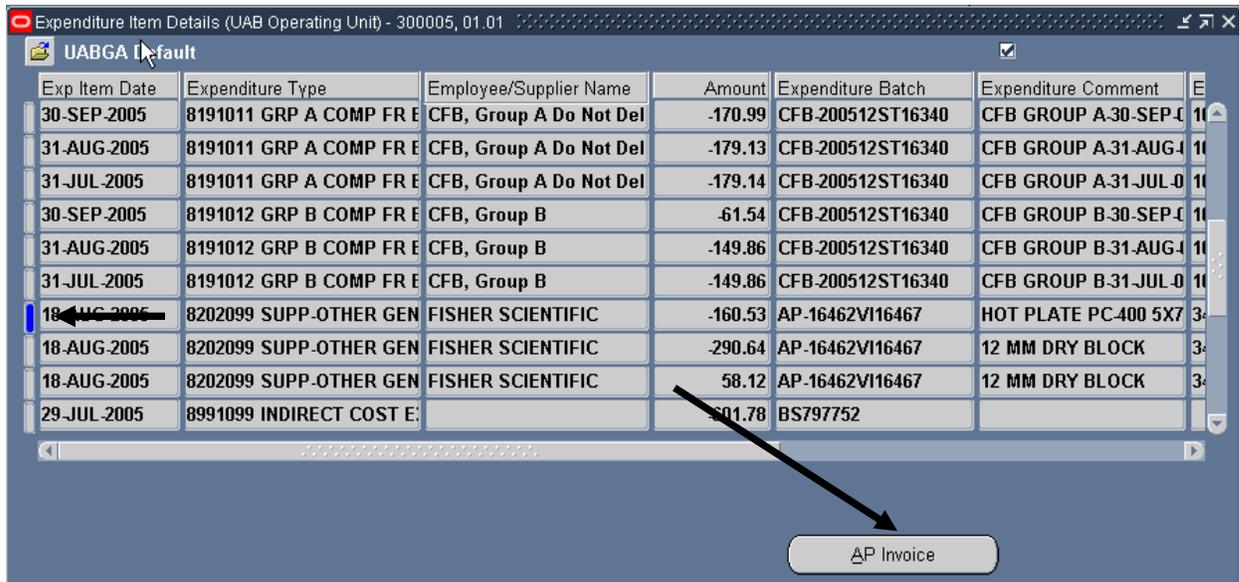
## UAB GA End User Project Status Inquiry Task Status

<b>AMOUNT</b>	Total amount of expenditure.
<b>EXPENDITURE BATCH</b>	System-generated batch number for locating transactions.
<b>EXPENDITURE COMMENT</b>	System-generated comments detailing HR/LD payroll processing data
<b>EMPLOYEE/SUPPLIER #</b>	Number assigned to vendor/employee in purchasing system.
<b>JOB</b>	Job number and description associated with employee job title
<b>TRANSACTION SOURCE</b>	Source of transaction.
<b>PA PERIOD</b>	Accounting period during which expenditure item was posted.
<b>QUANTITY</b>	Defaults to 1- number of transaction on line.
<b>AP INVOICE (BUTTON)</b>	Opens the <b>INVOICE OVERVIEW</b> window for the expenditure highlighted.

It is possible to export this information to an Excel worksheet. Click [here](#) to learn how.

It is also possible to drilldown from this information and see the actual Accounts Payable invoice.

12. Click in the field to the left of the expenditure for which you wish to see the invoice (so that the field is highlighted in blue), and click on the **AP INVOICE** button.



**Note:** This will open the **INVOICE OVERVIEW** window. From this point, users could click on the **SUPPLIER** button to see detailed information regarding this vendor, or click on the **INVOICES** button to see the actual invoice information. **The parts of the invoice overview window and the process or drilling down into AP invoices is discussed in detail in the [UAB AP End User](#) documentation.**

13. Click once on the **X** in the top, right-hand corner of this window to return to the **EXPENDITURE ITEM DETAILS** window.

## UAB GA End User Project Status Inquiry Task Status

Invoice Overview (UAB Operating Unit)

Supplier: FISHER SCIENTIFIC Site: A-ATLANTA

Supplier Num: 3440

Invoice Num: 7676452 Type: Credit Memo Date: 06-OCT-2005

Batch Name: 0666-120905 Currency: USD Amount: -160.53

Voucher: Unpaid: 0.00

PO Number: 1077746 Release: Unapplied:

Receipt Num: Settlement Date:

**Invoice Status**

Paid: Yes

Accounted: Yes

Status: Validated

Approval: Not Required

Description:

Active Hold: Reason:

**Scheduled Payments**

Curr	Amount	Remaining	Due Date	Held	Paid By	Paid On
USD	-160.53	0.00	28-OCT-2005	<input type="checkbox"/>	1485783 - Check	09-DEC-2005

**Actual Payments**

Payment Overview View PO Supplier Invoices

14. Click once on the **X** in the top, right-hand corner of this window to return to the main **TASK STATUS** window.

Expenditure Item Details (UAB Operating Unit) - 300005, 01.01

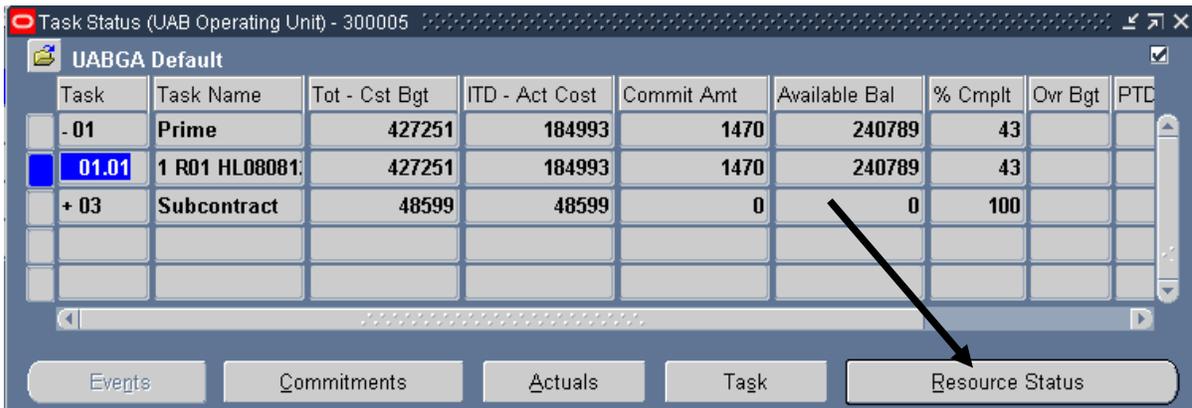
UABGA Default

Amount	Expenditure Batch	Expenditure Comment	Employee/Supplier #	Job	Transaction Source	PA Period	Qua
-170.99	CFB-200512ST16340	CFB GROUP A-30-SEP-0	1030024	0000000.Conve	GMSA CFB LD	GA-DEC-2005	1
-179.13	CFB-200512ST16340	CFB GROUP A-31-AUG-0	1030024	0000000.Conve	GMSA CFB LD	GA-DEC-2005	1
-179.14	CFB-200512ST16340	CFB GROUP A-31-JUL-0	1030024	0000000.Conve	GMSA CFB LD	GA-DEC-2005	1
-61.54	CFB-200512ST16340	CFB GROUP B-30-SEP-0	1030025	0000000.Conve	GMSA CFB LD	GA-DEC-2005	1
-149.86	CFB-200512ST16340	CFB GROUP B-31-AUG-0	1030025	0000000.Conve	GMSA CFB LD	GA-DEC-2005	1
-149.86	CFB-200512ST16340	CFB GROUP B-31-JUL-0	1030025	0000000.Conve	GMSA CFB LD	GA-DEC-2005	1
-160.53	AP-16462V116467	HOT PLATE PC-400 5X7	3440		Oracle Payables S	GA-DEC-2005	-160
-290.64	AP-16462V116467	12 MM DRY BLOCK	3440		Oracle Payables S	GA-DEC-2005	-290
58.12	AP-16462V116467	12 MM DRY BLOCK	3440		Oracle Payables S	GA-DEC-2005	58.1
-601.78	BS797752					GA-DEC-2005	0

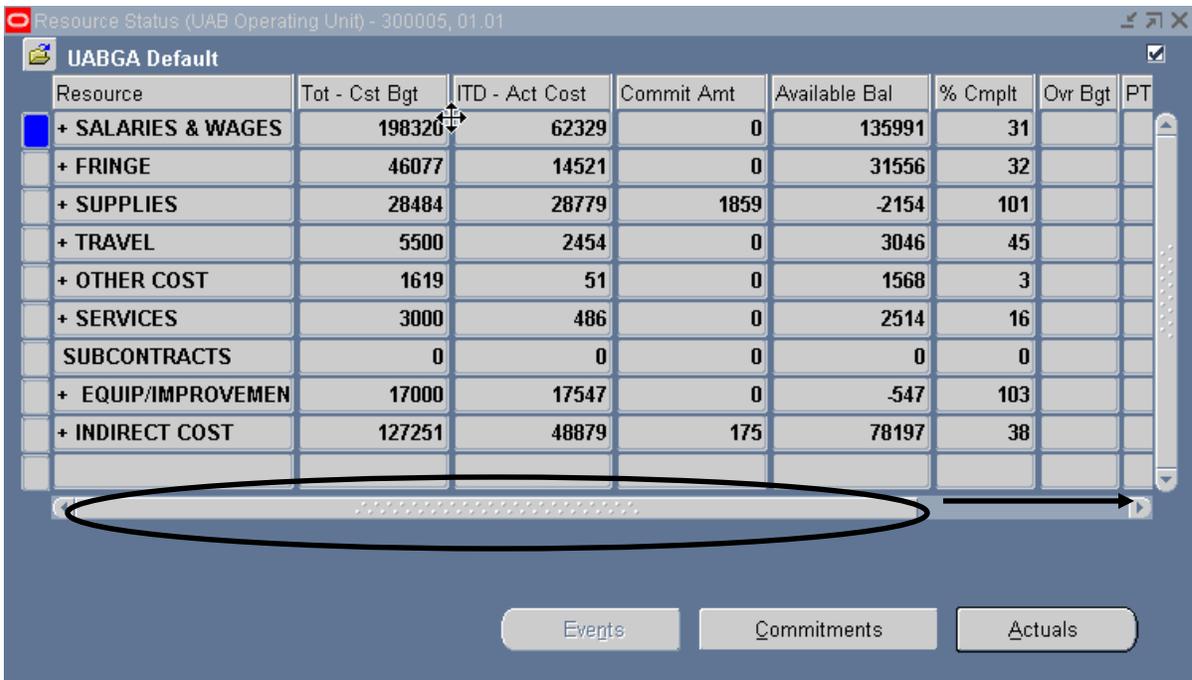
AP Invoice

## UAB GA End User Project Status Inquiry Task Status

15. Click on the **RESOURCE STATUS** button.



The **RESOURCE STATUS** window will display budget and actual information by resource used (i.e. salary, supplies, travel, etc.). The type of information contained in this window is equivalent to that maintained at the Award level. However, remember resource information viewed here is related to a specific Task. To see the rest of the resource status information related to this task, scroll to the right using the scroll bar at the bottom of this window.



A description of each column in the **RESOURCE STATUS** is detailed below.

<b>RESOURCE</b>	Expenditure Type category.
<b>RESOURCE NAME</b>	Name of a category (labor, services, materials, equipment, etc.) used to track, complete, and account for project work.
<b>OVR BGT</b>	If a "*" appears in this field, indicates that spending for this resource exceeds budgeted amount.
<b>ITD-REV BGT</b>	Not in use at UAB.

## UAB GA End User Project Status Inquiry Task Status

<b>ITD-ACT REV</b>	Not in use at UAB.
<b>ITD-CST BGT</b>	Inception-to-date total cost budget for resource.
<b>ITD-ACT COST</b>	Inception-to-date total amount of actuals for resource.
<b>COMMIT AMT</b>	Total amount of commitments for resource.
<b>PTD-ACT COST</b>	Period-to-date actuals for resource.
<b>FIN % CMLPT</b>	Percent of resource budget used.
<b>EST TO CMLPT</b>	Budget remaining for resource (rounded).
<b>COMMITMENTS (BUTTON)</b>	Opens the Find Commitments window for this task.
<b>ACTUALS (BUTTON)</b>	Opens the Find Actuals window for this task.

To see more detail regarding the resource status information related to this task, expand the expenditure pools which have a plus sign next to them.

16. Double click in the desired **RESOURCE** field to expand it.

Resource Status (UAB Operating Unit) - 300005, 01 01

UABGA Default

Resource	Tot - Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpl	Ovr Bgt	PT
+ SALARIES & WAGES	198320	62329	0	135991	31		
+ FRINGE	46077	14521	0	31556	32		
- SUPPLIES	28484	28779	1859	-2154	101		
8201099 SUPP-OTHER	0	418	0	-418		*	
8202099 SUPP-OTHER	0	26528	1859	-28387		*	
8205099 SUPP-OTHER	0	239	0	-239		*	
8208030 SUPP-NONCA	0	59	0	-59		*	
8208040 SUPP-NONCA	0	35	0	-35		*	
8208099 SUPP-OTH N	0	100	0	-100		*	
8209030 SUPP-CHEM/	0	1400	0	-1400		*	

## UAB GA End User Project Status Inquiry Task Status

17. Once the resource status information related to this task has been reviewed, click on the **X** in the top, right-hand corner of this window to return you to the main **TASK STATUS** window.

Resource Status (UAB Operating Unit) - 300005, 01.01

- Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpl	Ovr Bgt	PTD - Act Cost	Tot - Orig Cst B
198320	62329	0	135991	31		-5217	81720
46077	14521	0	31556	32		-1250	19298
28484	28779	1859	-2154	101		-393	25982
0	418	0	-418		*	0	0
0	26528	1859	-28387		*	-393	0
0	239	0	-239		*	0	0
0	59	0	-59		*	0	0
0	35	0	-35		*	0	0
0	100	0	-100		*	0	0
0	1400	0	-1400		*	0	0

Buttons: Events, Commitments, Actuals

18. Click on the **X** in the top, right-hand corner of this window to return to the main **PROJECT STATUS** window. From there, navigate to other screens in the **Project Status Inquiry** function or close out to the **Navigator** window.

Task Status (UAB Operating Unit) - 300005

Task	Task Name	Tot - Cst Bgt	ITD - Act Cost	Commit Amt	Available Bal	% Cmpl	Ovr Bgt	PTD
- 01	Prime	427251	184993	1470	240789	43		
01.01	1 R01 HL08081	427251	184993	1470	240789	43		
+ 03	Subcontract	48599	48599	0	0	100		

Buttons: Events, Commitments, Actuals, Task, Resource Status

[Return to Top](#)