Published on *University of Colorado* (https://www.cu.edu)

m-Fin PROJECT FINANCIAL STATUS [1]

December 5, 2013 by Carl Sorenson [2]



Area charts show expenditures as an area and budget as a line, cumulative over the life of the project.

Do you like **m-Fin OPERATING SUMMARY**? Want something like it that is specifically for projects? Try **m-Fin PROJECT FINANCIAL STATUS**, available now in Cognos QA. **[10-Jan-2014 migrated to production.]** It's in the new folder *Finance > Project Reports.* Here are some specifics about this new report.

The output

It's for projects only. This report is not meant for programs and in fact will not run for them.

It consolidates subclass. There is one page for each project regardless of how many subclass there are.



The negative available balance stop sign

It provides an AVAILABLE BALANCE SUMMARY. This section is like the one in m-Fin OPERATING SUMMARY. It shows a stop sign if available balance is negative.

It provides an optional ASSETS AND LIABILITIES section. This section is like the one in m-Fin OPERATING SUMMARY except that the user controls whether it appears.

It provides a highly summarized EXPENDITURES section. This section is similar to m-Fin EXPENDITURE TYPE SUMMARY. Instead of individual account codes, there is just one row each for salary, benefits, operating, travel, and F&A**.**

It provides an optional cumulative expenditures chart. This chart depicts the accumulation of expenditures over time for the entire life of the project. If there is any activity booked in accounting periods that are after the period of the project end date this will be shown with a different, lighter color.

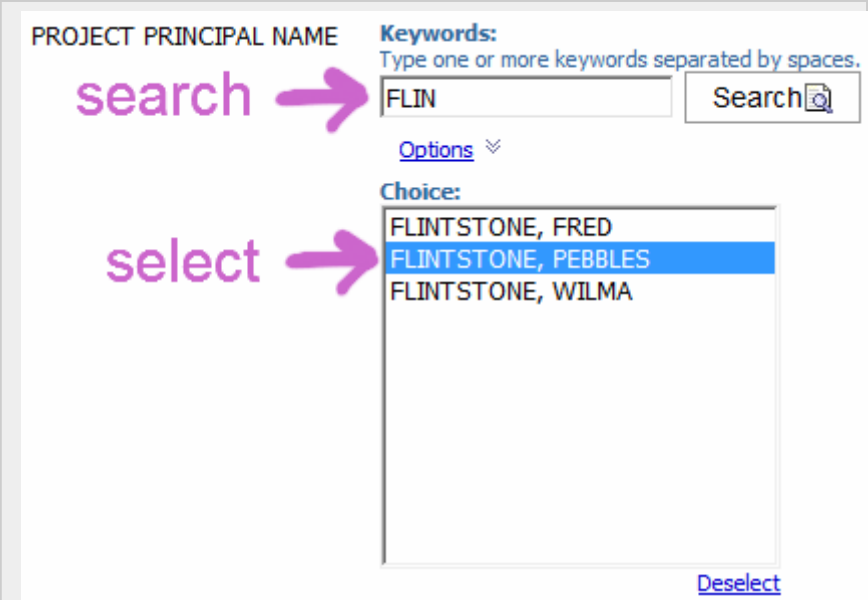
It provides an optional SAL, WAGES, AND BEN section. This section shows the names of all people paid by the project.

It sorts the output pages by project end date.

The prompting

Use the PROJECT ID prompt to run one project at a time. When you are ready to run your

next project id you can key it in and hit enter without returning to the prompt page. This is like m-Fin TRIAL BALANCE SUMMARY's single speedtype mode, but for project numbers instead.



To run for a PI you must select the PI name. Click on it to make it white on blue.

Use the PROJECT PRINCIPAL NAME prompt to run all projects for a PI. Enter the first four letters or so of the PI's last name and hit your enter key (or click the *Search* button if you are a devoted mouse enthusiast). Select the desired PI from the search results. Because this is a single-pick prompt, you simply select the PI name - there is no *Insert* button.

Use the AWARD CODE prompt to run all projects for one or more award codes. Instead of keying in the entire award code string you can key in just part of it and select the appropriate search mode under the *Options* link. If you want a space character to be used in your search string, enclose the string in double-quotes. For example, to find all award codes that start with "1 R" enter this into the keywords box with the double-quotes. Because this is a multi-pick prompt you can run the report for several awards that go together, like when there is a slightly different award code for each year.

The prompts interact. Examples: If you use the PROJECT END DATE prompt to eliminate projects that ended a long time ago they are eliminated not only from the output, but also from the PI and AWARD CODE search prompt results. If you select a PI name, the AWARD CODE prompt searches only that PI's projects.

Both of the chart offerings are *area* charts. Area charts are like line charts, but the area under the line is colored in. This helps the visual juxtaposition of expenditures against a budget line. The *classic* chart comes with axis and legend labeling. The *micro* chart does not. It is the same information but takes up less space.

Send email when Published:
No

Source URL:https://www.cu.edu/blog/m-fin/m-fin-project-financial-status

Links
[1] https://www.cu.edu/blog/m-fin/m-fin-project-financial-status [2] https://www.cu.edu/blog/m-

fin/author/1555