PI Financial Tool – Gen 2
Quick Reference – Project Details

Objectives:
Through using this quick reference guide, a PI Financials Tool user will be able to:
1. View spending by category on a project
2. Drill down on spending categories for additional detail
3. Change view to Scenario

Project Details – what does it do?
*Project Details* shows the Total Paid and Committed Spending on a specific project. Additionally, this page can show the Total Paid and Scenario Adjustments by changing the Current View.

Project Details – why would I use it?
*Project Details* can help you what has been spent on project, what is upcoming committed spending, or what effect a scenario will have on project spending.

Clicking on the **Project ID** hyperlink from home screen brings up the **Project Details** page

The **Project Detail** shows you the financial information for the project by spending categories. The **Balance** is calculated by taking the **Budget** and subtracting the **Total Paid** and **Committed Spending**. Total Paid is always current as of the last nightly load of WISDM.

**NOTE:** you may see slight discrepancies between the Paid Fringe amounts in PI Financials Tool and WISDM. This is due to rounding variances. For the most accurate financial information, use WISDM. The PI Financials Tool is for projections.
**Committed Spending** replaces the previous *Encumbrances* column. Rather than being limited to the current fiscal year, this column now uses HRS salary projections through the end of the project period, as listed in the official WISDM record, or five years into the future per the HRS calendar data, for projects with a longer end date. For non-salary expenses, purchase order encumbrances are included from WISDM. This means that this column will typically not match WISDM, but should provide a better forecast of spending commitments.

Select **Adjust Budgets** to manually enter or modify the dollar amounts in the budget categories. **New Scenario** takes you to the Create Scenario page. **Personnel** shows you the people paid on the current project. **Additional Documents** shows you documents associated with the project such as billing invoices or award documents, and is the same as would be seen in WISDM. The **Reload** link refreshes the data from WISDM, the official reporting system.

To view demographic information about the project, click the **Arrow** beneath the **Reload** link. Click the **Arrow** again to Collapse the information.
Clicking on the hyperlink dollar amount in the **Current Month Paid** or **Total Paid** columns will allow you to see the details of the specific Category.

Supply detail example.
Checking the **Enable Filtering** checkbox turns on filter criteria to quickly view/find specific types of transactions.

Enter the value in the filter field, then click the funnel icon to select which filter to apply. For example, to view transactions less than $1500, enter $1500 in the **Amount** field, then select “**Less Than**” from the filter options.

**Note:** Your filter selection will remain in place until you clear it out.
The **Current View** allows you to change from Actual Financials, which are expenses posted in the University’s official financial system, to a Scenario that you’ve created.

Use the pull-down list to change the **Current View** to one of your Scenarios.
When the **Current View** is changed to a Scenario, you will see the **Scenario Adjustments** column. This represents all the planned projection or scenario spending you entered in the Scenario.

![Project AAA1133](image)

Clicking on the hyperlink dollar amount in the **Scenario Adjustments** column will show you the details of Future Spending for the specific Scenario.

![AAA1133 Future Spending for Scenario: AAA1133](image)

Use the **Home** link at the top of the page to return to your Home screen. **Back to Project Detail** will take you back to the Project Detail page. From the Project Detail page, the **Back to Project List** will return you to your Home screen.