

Has payment been processed for my order?

1. In the PI Dashboard, select the *Tracking Purchases* tab.

The screenshot shows the Principal Investigator dashboard with several navigation tabs: Alerts, My Proposals, My Grants, Budget Overview, Tracking People, Tracking Purchases (highlighted with a red box), Travel, Monthly Summary, and Tracking Ca. Below the tabs, there is a list of alert categories with expandable icons (plus signs): Employees Terminating on a Grant in the next 45 days, Projects Terming in the next 90 days, Awards Terming in the next 90 days, Reports Coming Due in the next 90 days, Past Due Reports, New Awards Created Within 30 Days, Direct Spent At 90% Or Above, and New Person Assigned on a Grant in the last 30 Days.

2. By expanding each section, you can search for information by:

- a. **Vendor Invoices by Award/Project/Task** - this will result in a listing of all invoices that have been processed for all the awards you have access to during the posted date* period. You may want to narrow down this list by indicating the specific award/project/task.

***Posted Date** is the date the invoice was processed in Oracle, not the invoice date

The screenshot shows the search form for 'Vendor Invoices By Award/Project/Task'. Fields include: Award Number (61476), Project Number (1111282), Task Number (All Column Va), Award Name, Vendor Name, Award Status (ACTIVE, AT_RISK, ON_HOLD, CLOSED), Project Status (APPROVED, PENDING_CLOSE, CLOSED), Award Principal Investigator, Project Principal Investigator, Account Payable Invoice Status, and Expenditure Category. The '* Posted Date' field is highlighted with a red box and shows a date range 'Between 02/01/2014 - 03/31/2014'. Red arrows point to the Award Number, Project Number, and Task Number fields.

- b. **Vendor Invoice Summary** – will result in a list of all vendor payments to the identified vendor sorted by award.

The screenshot shows the search form for 'Vendor Invoice Summary'. The 'Vendor Name' field is highlighted with a red box and contains the text 'Staples Advan'. Other fields include: Award Number (All Column Values), Project Number (All Column Va), Award Status (ACTIVE, AT_RISK, ON_HOLD, CLOSED), and Project Status (APPROVED, PENDING_CLOSE, CLOSED). There are 'Apply' and 'Reset' buttons at the bottom right.

RF Report Center Quick Card

Has payment been processed for my order?

By clicking on the Supplier Invoice Amount...

Principal Investigator

Alerts My Proposals My Grants Budget Overview Tracking People **Tracking Purchases** Travel Monthly Summary Tracking Cash Credit Distribution

Vendor Invoices By Award/Project/Task

Vendor Invoice Summary

Vendor Invoice Summary

Vendor Name : Staples Advan Award Number : (All Column Va Award Status : (All Column Values) Project Status: (All Column Values)

Project Number : (All Column Va

ACTIVE APPROVED

AT_RISK PENDING_CLOSE

ON_HOLD CLOSED

Apply Reset

Select View : Award

Award Number	Vendor Name	Expenditure Category	Supplier Invoice Amount
000608	Staples Advantage	Supplies	1,200.38
004644	Staples Advantage	Supplies	7,029.39
010901	Staples Advantage	Supplies	1,016.10
21471	Staples Advantage	Supplies	21,664.96
24479	Staples Advantage	Supplies	309.07

It will give you payment information for each invoice

SUNY RF

Principal Investigator

Home Catalog Favorites Dashboards New Open Signed In As: LGILROY@BINGHAMTON.EDU

Vendor Expenditure Detail

Accounts Payable Invoice Number	Vendor Name	Award Number	Project Number	Task Number	Accounts Payable Invoice Status	Invoice Payment Method	Expenditure Category	Invoice Description	PO Number	Distribution Number	Expenditure Type	Posted Date	Expenditure Item Date	Supplier Invoice Amount
3108520147	Staples Advantage	21471	1042377	1	APPROVED	EFT	Supplies	RCH 1004630 FINAL CHAIR BILL	Not Applicable	1	SUP Office Supplies	09-Jul-2009	17-Sep-2008	539.97
3115886247	Staples Advantage	21471	1051008	1	APPROVED	CHECK	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	09-Mar-2009	27-Feb-2009	123.42
3116894826	Staples Advantage	21471	1051008	1	APPROVED	CHECK	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	02-Mar-2009	18-Mar-2009	24.64
3119409076	Staples Advantage	21471	1066849	1	APPROVED	CHECK	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	06-May-2009	12-May-2009	117.33
3119687066	Staples Advantage	21471	1059062	1	APPROVED	CHECK	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	27-May-2009	20-May-2009	64.99
3119997748	Staples Advantage	21471	1059062	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	22-Sep-2009	19-May-2009	499.99
3119997754	Staples Advantage	21471	1034629	1	APPROVED	CHECK	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	11-Jun-2009	28-May-2009	70.55
3120647755	Staples Advantage	21471	1051008	1	APPROVED	EFT	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	18-Jun-2009	10-Jun-2009	280.83
3120969116	Staples Advantage	21471	1059062	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	22-Sep-2009	19-May-2009	245.85
3121879394	Staples Advantage	21471	1059062	1	APPROVED	EFT	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	24-Jul-2009	07-Jul-2009	117.38
3121881753	Staples Advantage	21471	1059062	1	APPROVED	EFT	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	24-Jul-2009	07-Jul-2009	30.58
3121972010	Staples Advantage	21471	1059064	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	16-Jul-2009	09-Jul-2009	39.99
3121972010	Staples Advantage	21471	1059064	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	2	SUP Office Supplies	16-Jul-2009	09-Jul-2009	-39.99
3121972011	Staples Advantage	21471	1042377	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	16-Jul-2009	07-Jul-2009	134.99
3122218240	Staples Advantage	21471	1042377	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	28-Jul-2009	09-Jul-2009	-134.99
3122400251	Staples Advantage	21471	1059062	1	APPROVED	EFT	Supplies	RCH 1004217	Not Applicable	1	SUP Office Supplies	29-Jul-2009	23-Jul-2009	161.06
3124713376	Staples Advantage	21471	1042460	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	22-Sep-2009	09-Sep-2009	82.47
3124713378	Staples Advantage	21471	1042460	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	22-Sep-2009	09-Sep-2009	35.70
3124713380	Staples Advantage	21471	1042460	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	22-Sep-2009	09-Sep-2009	54.61
3126609703	Staples Advantage	21471	1051040	1	APPROVED	EFT	Supplies	RCH 1005205	Not Applicable	1	SUP Office Supplies	02-Nov-2009	21-Oct-2009	0.05

Return - Analyze - Edit - Refresh - Print - Export - Create Bookmark Link

Rows 1 - 20

c. **Open Purchase Orders** – will result in a list of open purchase order for any indicated award/project/task.

Principal Investigator

Alerts My Proposals My Grants Budget Overview Tracking People **Tracking Purchases** Travel Monthly Summary Tracking Cash Credit Distribution Tracking Account Rece

Vendor Invoices By Award/Project/Task

Vendor Invoice Summary

Open Purchase Orders

Open Purchase Orders

Award Number : 61476 Award Name : --Select Value-- Award Principal Investigator: --Select Value--

Project Number : --Select Value-- Project Principal Investigator : --Select Value-- Expenditure Type : --Select Value--

PO Number : --Select Value-- PO Release Number : --Select Value--

Apply Reset

Has payment been processed for my order?

- d. **PO Summary by Award/Project/Task** – provides a list of activity dependent on the search criteria you indicate. Searches can be done by Vendor name, PO Number, Project Number, etc.

PO Summary By Award/Project/Task

Vendor Name : PO Number : Project Number : PO Closure Status : Award Status: (All Column Values) ACTIVE AT_RISK ON_HOLD CLOSED Project Status: (All Column Values) APPROVED PENDING_CLOSE CLOSED

Expenditure Type : Project Principal Investigator :

Award Number : Task Number :

Award Principal Investigator :

3. To check the available balance on a particular award, refer to the *Direct Available Balance* column.

Grant Expenditure Detail By Monthly Date Range

Award

Award Number : Award Name : Select To Include Cost Sharing Awards : Award Principal Investigator :

Award Status : Award Organization : Sponsor Name :

Select View :

Award Number	Award Name	Sponsor Name	Sponsor ID Number	Award Type	Award Status	Award Principal Investigator	Award CO-Principal Investigator	Award Organization	Award Start Date	Award End Date	Days Remaining	% Direct Spent	Payroll Encumbrance Shortage	Direct Current Budget	Direct Expense	Direct Encumbrance	Direct Available Balance
	Confucius Institute of China	na		Foreign	ACTIVE		UNSPECIFIED	020 Institute for Asia and Asian Diasporas (RF)	01-Jan-2014	31-Dec-2014	293	0.00	0.00	70,000.00	0.00	0.00	70,000.00
	Knowles Electronics LLC	Agreement 14041511		Nonfederal	ACTIVE		UNSPECIFIED	020 Mechanical Engineering	06-Jan-2014	31-Dec-2015	658	0.00	0.00	82,687.00	0.00	0.00	82,687.00
	Arizona Board of Regents	124740		Federal Flow Through	ACTIVE		UNSPECIFIED	020 Geology	01-Sep-2013	31-Aug-2014	171	2.02	0.00	28,313.00	573.00	0.00	27,740.00

Please note the amount shown is the direct cost balance. This amount reflects the funds that are available to spend in direct relation to your project.