SOP Number: 6
SOP Title: Estates Project Balance Enquiry
Version: 1.0
Date Created: 13/11/2023
Created By: Humza Iqbal
1. INTRODUCTION

The Change Control Workflow History Enquiry has been created to give the user visibility and control of checking their project position at any given time (essentially a funds check).

2. PURPOSE

The enquiry was created to provide the level of detail they require when it comes to checking on their project position without having to request a funds check be provided. This level of detail provided by the enquiry allows the user to have full information of what their different budget heading position is and the overall position of their project, along with funds available after actuals and commitments have been taken into consideration.

3. CHANGE CONTROL WF HISTORY ENQUIRY

When logged into Agresso, click on the ‘Reports’ option on the left-hand side, then open folder ‘18 – Estates PM Enquiries’, then select the ‘Estates Project Balance Enquiry’ report.

Once the enquiry has been opened, the below screen will appear:

Type in the sub-project number you wish to run the enquiry for & then click ‘Search’
Once the enquiry has been opened it will look like the below:

The budget headings are then brought up and these can be expanded to show more detail by clicking the '+' button and then minimised by clicking the '-' button.