

# How To Run Opportunity Project Reports

1

In Search box, type in "GSI - Find Projects". Click on "GSI - Find Projects" under Tasks and Reports.

The screenshot displays the Guest Services application interface. At the top, a green header bar contains the text 'Implementation - guestservices3'. Below this, a dark grey bar indicates the user is 'On behalf of: Brad Smith (022506)'. The main interface is divided into a left sidebar and a right content area. The sidebar has a 'MENU' button and the 'GUEST SERVICES' logo. It lists 'Saved Categories' with 'People' (0) and 'Tasks and Reports' (1), and a 'More Categories' section. The right content area has a search bar with 'gsi - find projects' entered. Below the search bar, the 'Tasks and Reports' section shows a link for 'GSI - Find Projects' (highlighted with an orange circle) under the 'Report' category. A description follows: 'This advanced report enables managers to find and review projects on the company, project hierarchy, dates, status, owner, and percent into the project details for more information. This report uses the ~ Required prompt: Projects and Project Hierarchies.' At the bottom, a box asks 'Didn't find what you were looking for?' and suggests 'Try searching under More Categories.'

Implementation - guestservices3

On behalf of: Brad Smith (022506)

MENU GUEST SERVICES

gsi - find projects

**Tasks and Reports**

[GSI - Find Projects](#) ...

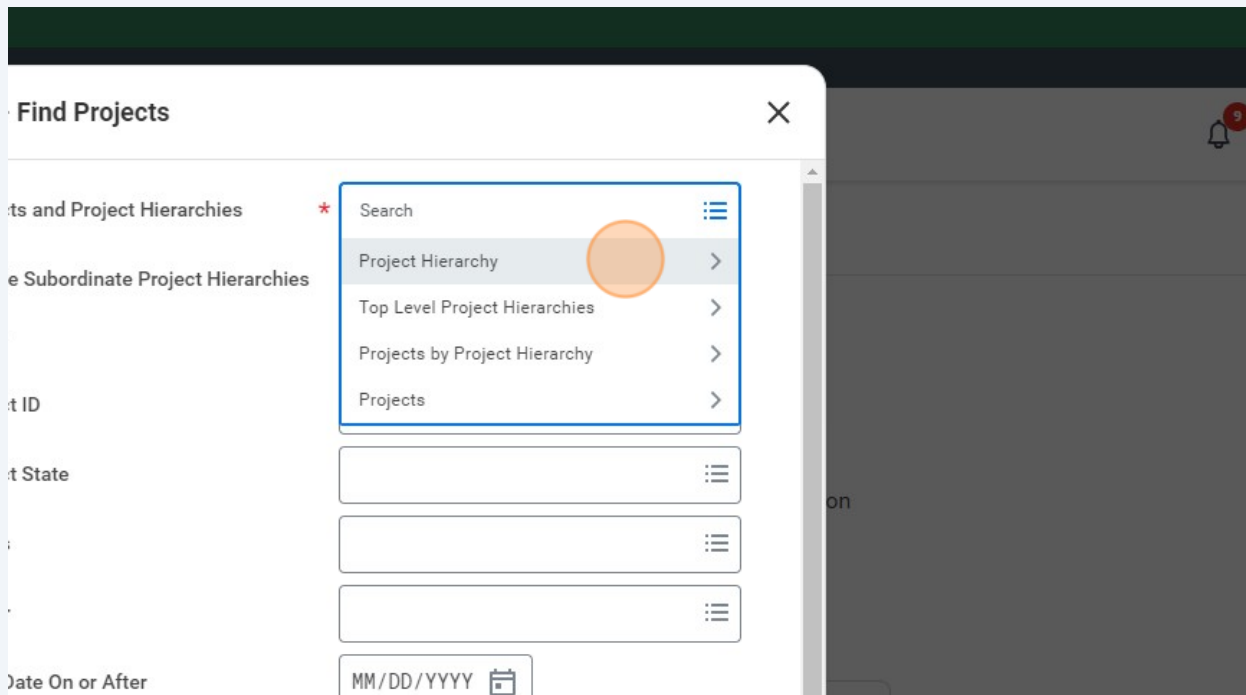
Report

This advanced report enables managers to find and review projects on the company, project hierarchy, dates, status, owner, and percent into the project details for more information. This report uses the ~ Required prompt: Projects and Project Hierarchies.

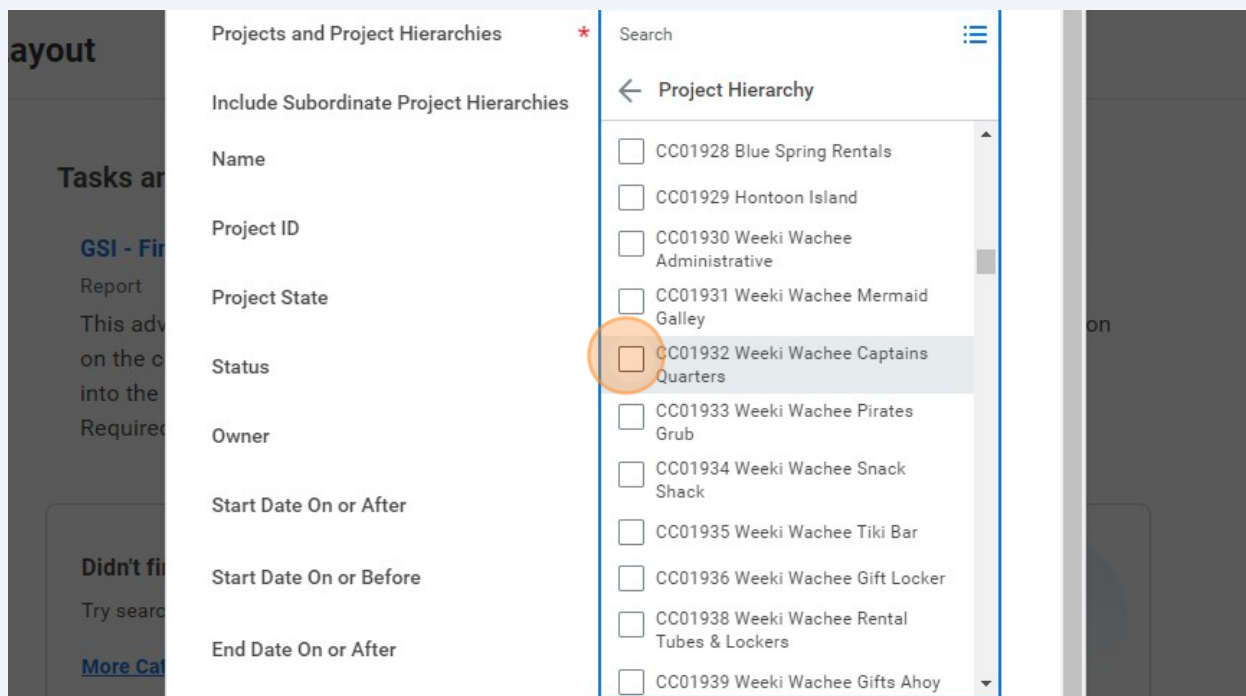
**Didn't find what you were looking for?**

Try searching under More Categories.

2 In the "Project and Project Hierarchies" field, select "Project Hierarchy".



3 Select Cost Center(s).



- 4 Check the box for "Include Subordinate Project Hierarchies".

**GSI - Find Projects**

Projects and Project Hierarchies \*

- × CC01932 Weeki Wachee Captains Quarters
- × CC01973 De Leon Springs Food & Beverage

☒ Include Subordinate Project Hierarchies

Name

Project ID

Project State

Status

Owner

- 5 You have the option to add additional filters such as Project ID or Owner (person who created the Opportunity Project) to narrow the search. Click "OK".

After MM/DD/YYYY

Before MM/DD/YYYY

cy

Cancel OK

6

Note, if a project has a "[0]", this means the project has not yet been approved. Click on "Project" for more information.

## GSI - Find Projects



### > Details

3 items

Project	Project ID	Owner	Start Date	End Date	Project Status
<a href="#">Beverage Merchandiser_1932_05062024 [0]</a>	P-100056	<a href="#">Brad Smith (022506)</a>	05/06/2024	12/31/2024	Proposed
<a href="#">Chair [0]</a>	P-100057	<a href="#">Karen Hager (001114)</a>	05/06/2024		Proposed
<a href="#">Outdoor Equipment_1973_040524</a>	P-100037	<a href="#">Laura Sherman (012217)</a>	04/05/2024		Active

7

Click "Summary" and "Additional Data" tabs for details.

Owner [Brad Smith \(022506\)](#)

Start Date 05/06/2024

Percent Complete  0%

End Date 12/31/2024

Status Proposed

Overview

Financials

Summary

Details

Role Assignment

Additional Data

Process History

Attachments

Edit

Apply Project Templates

### ▼ Project Summary

Project Name Beverage Merchandiser\_1932\_05062024

### ▼ Refere

Project Hierarcl

Start Date 05/06/2024

Optional Projec

- 8 Click "Process History" to see the status of the project.

Proposed

Financials

Details

Role Assignment

Additional Data

Process History

Attachments

Of 05/07/2024

l Expenditure Request

ed By

scription

Requested

ure Classification

Matt Smith

Beverage merchandise for juices

22000

Replacement (only if retiring assets)

- 9 For Opportunity Projects [O], check "Status" column to see the awaiting action. Once this action is completed, the Opportunity Project will move to the next level in the approval process.

05/06/2024 10:52:00 AM	05/08/2024	Ann Spivey (022492)	1	
05/06/2024 10:59:58 AM	05/07/2024	Laura Sherman (012217) (CER Approval - VP)	1	
05/06/2024 11:02:26 AM	05/07/2024	Karen Hager (001114) (Project Administrator)	1	
05/06/2024 10:13:12 AM	05/08/2024	Brad Smith (022506)	1	
05/06/2024 10:18:05 AM	05/08/2024	Brad Smith (022506) (Initiator)	1	
05/06/2024 10:31:51 AM	05/08/2024	Laura Sherman (012217) (CER Approval - VP)	1	
05/06/2024 10:35:49 AM	05/08/2024	Karen Hager (001114) (Project Administrator)	1	
05/06/2024 10:41:13 AM	05/08/2024	Daniel Stoltzfus (028184) (CER Approval - CFO)	1	