



## PRESTO USER MANUAL

### How to View the Details of UOS/FMO Charges in Presto

#### Step 1

- a. Go to the Budgets tab
- b. Select your building
- c. Click on the [YTD Expended](#) for the Project you want to research.

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**PRESTO** Physical Resources Expense System Tracking Operations

**Budgets** | [Contracts](#) | [ECM](#) | [Invoices](#) | [Projects](#) | [Reports](#) | [Work Orders](#)

View Budget  
[Budgets](#) > [View Budgets](#) >

Budget: FY14 (Active) Finished

Filter By Building: **NW Labs**

Projects: 93

FAS # ▲	Project	Billing Code	Original Budget	Current Budget	YTD Expended	Available Amt
6120-04560	<a href="#">Other Temporary Staff</a>	370-32500-6120-000001-626820-0000-04560	\$0	<a href="#">\$0</a>	<a href="#">\$0</a>	\$0.00
6600-04560	<a href="#">Lab Supplies</a>	370-32505-6600-000001-626800-0000-04560	\$0	<a href="#">\$1,000</a>	<a href="#">\$87</a>	\$912.31
6640-04560	<a href="#">Building Manager Office Supplies</a>	370-32500-6640-000001-626800-0000-04560	\$6,000	<a href="#">\$6,000</a>	<a href="#">\$2,177</a>	\$3,822.48
6693-04560	<a href="#">First Aid Supplies</a>	370-32500-6693-000001-626800-0000-04560	\$3,000	<a href="#">\$3,000</a>	<a href="#">\$715</a>	\$2,284.18
6760FR397-04560	<a href="#">Furniture Allowance - MCB (Northwest)</a>	370-32505-6760-000001-626800-0000-04560	\$0	<a href="#">\$7,882</a>	<a href="#">\$7,882</a>	\$0.00
6760FR449-04560	<a href="#">Furniture Allowance - OEB (Northwest)</a>	370-32505-6760-000001-626800-0000-04560	\$0	<a href="#">\$302</a>	<a href="#">\$302</a>	\$0.00
6770pl1-04560	<a href="#">Bldg Ops Drinking Water</a>	370-32500-6770-000001-626800-0000-04560	\$700	<a href="#">\$700</a>	<a href="#">\$400</a>	\$300.00
6770pl2-04560	<a href="#">NW Rentals of Equipment</a>	370-32500-6770-000001-626800-0000-04560	\$16,900	<a href="#">\$16,824</a>	<a href="#">\$2,436</a>	\$14,388.00
6770pl3-04560	<a href="#">NWL Copiers</a>	370-32500-6770-000001-626800-0000-04560	\$8,000	<a href="#">\$8,000</a>	<a href="#">\$3,013</a>	\$4,986.20
7120-04560	<a href="#">NW Labs Small Projects</a>	370-32510-7120-000001-626600-0000-04560	\$150,000	<a href="#">\$107,195</a>	<a href="#">\$0</a>	\$107,195.00
7120ct1-04560	<a href="#">B4 CBS Machine Shop Space Expansion</a>	370-32520-7120-000001-626855-1406-04560	\$0	<a href="#">\$74,223</a>	<a href="#">\$0</a>	\$74,223.00
7130-04560	<a href="#">Building Operators</a>	370-32510-7130-000001-626640-0000-04560	\$228,550	<a href="#">\$228,550</a>	<a href="#">\$156,158</a>	\$72,391.36
7130br-04560	<a href="#">Breakdown Mechanical Maintenance /FMO</a>	370-32510-7130-000001-626640-0000-04560	\$100,000	<a href="#">\$99,000</a>	<a href="#">\$57,612</a>	\$41,387.27
7130pl-04560	<a href="#">Planned Mechanical Maintenance/FMO</a>	370-32510-7130-000001-626650-0000-04560	\$100,000	<a href="#">\$104,557</a>	<a href="#">\$41,434</a>	\$63,122.37
7130pl1-04560	<a href="#">Gas Manifold Support</a>	370-32510-7130-000001-626650-0000-04560	\$66,840	<a href="#">\$66,840</a>	<a href="#">\$28,205</a>	\$38,634.37
7130pl4-04560	<a href="#">Animal Area Support</a>	370-32510-7130-000001-626650-0000-04560	\$26,250	<a href="#">\$26,250</a>	<a href="#">\$10,240</a>	\$16,009.91
7132-04560	<a href="#">Operations Center Care &amp; Ops</a>	370-32510-7132-000001-626650-0000-04560	\$64,810	<a href="#">\$64,810</a>	<a href="#">\$37,800</a>	\$27,009.10
7133br-04560	<a href="#">Breakdown Electrical Maintenance/FMO</a>	370-32510-7133-000001-626640-0000-04560	\$53,045	<a href="#">\$53,045</a>	<a href="#">\$35,309</a>	\$17,735.99
7133pl-04560	<a href="#">Planned Electrical Maintenance/FMO</a>	370-32510-7133-000001-626650-0000-04560	\$82,750	<a href="#">\$88,950</a>	<a href="#">\$34,031</a>	\$54,918.71



## PRESTO USER MANUAL

### Step 2

- a. The *Project Transaction History* screen opens
- b. Copy the Invoice # that corresponds to the Vendor and Date you want to research.

### Project Transaction History

**Budget:** FY14  
**Building:** NW Labs  
**Project:** 7130br-04560 - Breakdown Mechanical Maintenance /FMO  
**Billing Code:** 370-32510-7130-000001-626640-0000-04560  
**Original Budget:** \$100,000.00  
**Current Budget:** \$99,000.00  
**Available:** \$41,387.27

Invoices: 25

Date	Invoice #	Vendor	Amount
6/28/2013	<a href="#">54574946</a>	MCMASTER CARR SUPPLY CO	(\$314.81)
7/31/2013	<a href="#">66440</a>	UOS JUL 2013 BREAKDOWN MISC. M	(\$6,353.99)
8/5/2013	<a href="#">37162</a>	MANCINI SHEET METAL INC	(\$1,100.00)
8/7/2013	<a href="#">901348723</a>	SIEMENS WATER TECHNOLOGIES	(\$1,012.63)
8/13/2013	<a href="#">9216458316</a>	GRAINGER INC	(\$133.15)
8/27/2013	<a href="#">31145740</a>	HOBART SERVICES	(\$343.90)
8/31/2013	<a href="#">66440</a>	UOS AUG 2013 BREAKDOWN MISC. M	(\$4,584.33)
9/4/2013	<a href="#">9234084201</a>	GRAINGER INC	(\$117.90)
9/23/2013	<a href="#">901405363</a>	SIEMENS WATER TECHNOLOGIES	(\$4,145.88)
9/25/2013	<a href="#">37372</a>	MANCINI SHEET METAL INC	(\$125.00)
9/30/2013	<a href="#">66440</a>	UOS SEP 2013 BREAKDOWN MISC. M	(\$4,575.14)
10/7/2013	<a href="#">YS00071126</a>	YALE APPLIANCE AND LIGHTING	(\$1,328.99)
10/29/2013	<a href="#">16360</a>	CITY PUMP & MOTOR SERVICES I	(\$3,900.00)
10/31/2013	<a href="#">31245421</a>	HOBART SERVICES	(\$332.20)
10/31/2013	<a href="#">66440</a>	UOS OCT 2013 BREAKDOWN MISC. M	(\$8,494.14)
11/19/2013	<a href="#">154201754</a>	PERKINS	(\$105.88)
11/30/2013	<a href="#">66440</a>	UOS NOV 2013 BREAKDOWN MISC. M	(\$9,633.11)
12/2/2013	<a href="#">9307341124</a>	GRAINGER INC	(\$69.58)
12/4/2013	<a href="#">31295524</a>	HOBART SERVICES	(\$477.90)
12/4/2013	<a href="#">YS00076562</a>	YALE APPLIANCE AND LIGHTING	(\$579.98)
12/5/2013	<a href="#">YS00076562-1</a>	YALE APPLIANCE AND LIGHTING	(\$499.99)
12/31/2013	<a href="#">37835</a>	MANCINI SHEET METAL INC	(\$526.00)
12/31/2013	<a href="#">66440</a>	UOS DEC 2013 BREAKDOWN MISC. M	(\$3,615.42)
1/31/2014	<a href="#">66440</a>	UOS JAN 2014 BREAKDOWN MISC. M	(\$5,032.81)
1/31/2014	<a href="#">S2913919.001</a>	METROPOLITAN PIPE & SUPPLY CO	(\$210.00)
<b>Total:</b>			<b>(\$57,612.73)</b>



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### Step 3

- Go to the Reports tab
- Select the Invoices tab
- Click on the [Lookup by Invoice #](#) for the Project you want to research.

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PRESTO Physical Resources Expense System Tracking Operations

Budgets | Contracts | ECM | Invoices | Projects | **Reports** | Work Orders

### Reports

[Reports >](#)

Budgets | Contracts | ECM | **Invoices** | Work Orders | Saved Reports

[Invoice Report](#)  
Displays a summary of all invoices by building, vendor, billing code, batch status, and/or invoice date.

Invoice Lookup

- [Lookup by Invoice #](#)
- [Lookup by Invoice Creator](#)

### Step 4

- Enter the Invoice # (or numbers) into the open box.
- Click on *Lookup Invoices*.

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PRESTO Physical Resources Expense System Tracking Operations

Budgets | Contracts | ECM | Invoices | Projects | **Reports** | Work Orders

### Invoice Lookup - Setup

[Reports >](#) [Invoice Lookup - Setup >](#)

1 Select a Vendor to include in the report.

ALL VENDORS

2 Enter Invoice #s to include in the report.

66440

To lookup multiple Invoice #s, enter one on each line.

**Lookup Invoices** Cancel



## PRESTO USER MANUAL

### Step 5

- Scroll down to the Invoice Date and
- Click on the Invoice # for the Project you want to research.

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**PRESTO** Physical Resources Expense System Tracking Operations

Budgets | Contracts | ECM | Invoices | Projects | Reports | Work Orders

Invoice Lookup  
[Reports > Invoice Lookup - Setup > Invoice Lookup >](#)

REPORT CRITERIA 2/19/2014 10:47:07 AM

Vendor: ALL VENDORS  
 Invoice #: 66440

Invoices: 43

Invoice Date	Invoice #	Vendor	Invoice Amt	Project Information & Amount	Create Date	Status	Batched
1/31/2014	66440	UOS JAN 2014 BREAKDOWN MISC. M	\$5,032.81	NW Labs 7130br-04560 Breakdown Mechanical Maintenance /FMO \$5,032.81	2/12/2014	Approved	Yes
12/31/2013	66440	UOS DEC 2013 BREAKDOWN MISC. M	\$3,615.42	NW Labs 7130br-04560 Breakdown Mechanical Maintenance /FMO \$3,615.42	1/13/2014	Approved	Yes
11/30/2013	66440	UOS NOV 2013 BREAKDOWN MISC. M	\$9,633.11	NW Labs 7130br-04560 Breakdown Mechanical Maintenance /FMO \$9,633.11	12/11/2013	Approved	Yes
10/31/2013	66440	UOS OCT 2013 BREAKDOWN MISC. M	\$8,494.14	NW Labs 7130br-04560 Breakdown Mechanical Maintenance /FMO \$8,494.14	11/15/2013	Approved	Yes
9/30/2013	66440	UOS SEP 2013 BREAKDOWN MISC. M	\$4,575.14	NW Labs 7130br-04560 Breakdown Mechanical Maintenance /FMO \$4,575.14	10/10/2013	Approved	Yes
8/31/2013	66440	UOS AUG 2013 BREAKDOWN MISC. M	\$4,584.33	NW Labs 7130br-04560 Breakdown Mechanical Maintenance /FMO \$4,584.33	9/10/2013	Approved	Yes



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### Step 6

- a. The Invoice Details page will open.
- b. The WO # listed can lead you to additional details from UOS.

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**PRESTO** Physical Resources Expense System Tracking Operations

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[Budgets](#) | [Contracts](#) | [ECM](#) | [Invoices](#) | [Projects](#) | [Reports](#) | [Work Orders](#)

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### Invoice Details

[Reports](#) > [Invoice Lookup - Setup](#) > [Invoice Lookup](#) > [Invoice Details](#) >

Invoice #: 66440    
 Vendor: UOS JAN 2014 BREAKDOWN MISC. M  
 Status: Approved

INVOICE INFORMATION

Invoice Date:	1/31/2014
Invoice Amount:	\$5,032.81
Description of Expenditure:	WO #1033547/1: GENERAL REPAIR
	WO #1033597/1: GENERAL REPAIR
	WO #1036799/1: AUTOMATION POINT IN ALARM/TROU
	WO #1041230/1: OVERHEATING EQUIPMENT
	WO #1041955/1: GENERAL REPAIR
	WO #1043076/1: GENERAL REPAIR
	<span style="border: 2px solid red; border-radius: 50%; padding: 2px;">WO #1044724/1: EQUIPMENT MALFUNCTIONING</span>
	WO #1046511/1: GENERAL REPAIR
	WO #1046521/1: GENERAL REPAIR
	WO #1046522/1: GENERAL REPAIR
	WO #1046696/1: GENERAL REPAIR
	WO #1047508/1: GENERAL REPAIR
	WO #963912/1: EQUIPMENT MALFUNCTIONING

Batched: Yes

VENDOR INFORMATION

Vendor: UOS JAN 2014 BREAKDOWN MISC. M

### Step 7

- a. To view a detailed **UOS Project & Work Order Report**, go to the following url and login with your HUID and PIN.
- b. [https://apps.campuservices.harvard.edu/webspd/proj\\_rpt.htm](https://apps.campuservices.harvard.edu/webspd/proj_rpt.htm)



## PRESTO USER MANUAL

### Step 8

- Click on [Select by Projects and Work Orders](#) to see the Query Form.
- Enter Starting Date and Ending Date
- Enter Project Numbers (Presto Invoice #) Example: 66440
- Enter Work Orders (Presto WO #) Example: 1044724/1
- Click on [Submit Request](#) at bottom of form.

Click on Type of Selection Criteria You Would Like To Use:


- [Select by Projects and Work Orders](#)
- [Select by Other Criteria](#)
- [Help](#)
- [Return to Login Screen](#)

**Project and Work Order Report** *Query Form*


Please Enter Start and End Date (mmddyyyy or mm/dd/yyyy)

Starting Date: 01/01/2014 Ending Date : 01/31/2014

Enter Up to 20 Project Numbers (At least one must be entered)

Project Numbers: 66440 

Enter Up to 5 Work Order/Tasks (If blank, ALL work tasks for selected projects will be included)

Work Orders: 1044724/1 

**Report Output Options**

**Report Type**

- Totals Only (Includes Project Summaries Only)
- Standard (Includes Project and Work Order Summaries)
- Detail (Includes Work Order Detail)

**Sort Order**

- By Project #
- By Entity ID
- By Entity Name
- By Tub/Org/Object
- By Project Type

**Destination**

- Screen
- Excel (Version Excel 97 or higher)



## PRESTO USER MANUAL

### Step 9

- View the entire report by scrolling down.
- Click on *Download to Excel* button at bottom of screen if desired.

#### Project and Work Order Report

Selection Criteria			
From:	01/01/2014	To:	01/31/2014
Projects:	66440	Work Orders:	1044724/1
Report Type:	Standard	Sorted By:	Project #

Quick View Summary				
Project #	Description	Entity	Work Orders	Cost
66440	Breakdown Misc. Mechanical Maintenance	Northwest Laboratory	1	\$255.00
<b>Totals</b>			<b>1</b>	<b>\$255.00</b>

Project 66440 01/01/2014 - 01/31/2014			
Project#: 66440	Breakdown Misc. Mechanical Maintenance		
Entity: 33765	Northwest Laboratory		
Customer Reference #: 7130br-04560	Status: Open		
Project Type: MECH	Mechanical - General		
Current Expense Account Information			
Entity ID	Entity Name	Expense Coding	Allocation
33765	Northwest Laboratory	370-32510-7130-000001-626600-0000-04560	0%
33765	Northwest Laboratory	370-32510-7130-000001-626640-0000-04560	100%
Activity			
	Unbilled	Billed	Total
Labor Hours	0.00	3.00	3.00
Labor \$	\$0.00	\$255.00	\$255.00
Stock \$	\$0.00	\$0.00	\$0.00
Non-Stock \$	\$0.00	\$0.00	\$0.00
Contracts \$	\$0.00	\$0.00	\$0.00
Miscellaneous \$	\$0.00	\$0.00	\$0.00
Utilities \$	\$0.00	\$0.00	\$0.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$255.00</b>	<b>\$255.00</b>



**PRESTO USER MANUAL**

Continued from previous page.

Project 66440 - Work Order 1044724/1 01/01/2014 - 01/31/2014			
Entity: 43395	Medical Air System		
Status: Closed	Supervisor: Roger Edgerly		
Customer Reference #: Not Provided	Customer Requester: Brian Snee.		
Date Open: 01/06/2014	Date Closed: 01/06/2014		
Work Task Title: Equipment Malfunctioning			
Work Task Description: Replaced / updated head assembly on air drier, aircompressor.			
Activity Summary			
	Unbilled	Billed	Total
Labor Hours	0.00	3.00	3.00
Labor \$	\$0.00	\$255.00	\$255.00
Stock \$	\$0.00	\$0.00	\$0.00
Non-Stock \$	\$0.00	\$0.00	\$0.00
Contracts \$	\$0.00	\$0.00	\$0.00
Miscellaneous \$	\$0.00	\$0.00	\$0.00
Utilities \$	\$0.00	\$0.00	\$0.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$255.00</b>	<b>\$255.00</b>

[Download to Excel](#)

**Note:**

The monthly charges for all UOS services, including FMO, utilities and custodial, will be uploaded into Presto every month on or around the 10<sup>th</sup> of each month.