



QUICK REFERENCE GUIDE:

5.5 - PSA Expiring Status Report

Background:

The PSA Expiration Status report is available in the PSA User role. This report displays the Region, Manager, Project Title, Prime Consultant, Status and Contract Completion date. The PSA Manager can be updated when there is a new manager (steps below) and the completion date can be updated by entering the amendment that changes the completion date using the PSA Quick Reference Guide 5.1 - Adding Amendments.

Roles:

PSA User

Navigation:

Running the PSA Expiring Status Report XLS

1. From the Dashboard click the **Global Actions Menu** and select **Generate Report**
2. Search for and select the **PSA Expiring Status Report XLS** report
3. Click the **Next** button (the small arrow pointing the right)
4. Press enter in the **Search** field or the **Show First 10** link and click the **All** link to select all
5. Click the **Next** button again and enter the **Begin Date** and **End Date** and select the **Region**
6. Press **Execute**. The file will download as an excel in the Downloads folder on your computer

Update the PSA Manager:

Contract Administration Overview

1. In the Contract Administration **Search** field search for the contract for which you need to update the PSA Manager
2. Click the **Contract** link
3. Use the first name or last name to search for and select the updated PSA Manager in the **Construction Project Manager** field
4. Click **Save**

If you need further assistance, please contact your Module Admin
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