Goal: To provide basic, best practice, information on the various reports and queries available to USF research administrators.

Resources: TRAIN® Depot: <u>http://www.research.usf.edu/TRAIN/finanAdminTech.asp</u> MyUSF Portal site: <u>https://my.usf.edu/</u> COS/Pivot: <u>http://pivot.cos.com/</u> USF Finance Mart: <u>https://eusf.admin.usf.edu/Topics/Applications/Queryland/Pages/default.aspx</u> Research Reports: <u>https://reports.research.usf.edu/Report/</u> Payroll Bi-Weekly Schedule: <u>http://www.usf.edu/business-</u> <u>finance/controller/payroll/payrollcertsschedules.aspx</u> TRAIN® HelpOne Service Center: 813-97-HELP1 (813-974-3571); TRAIN@usf.edu

Purpose: The <u>USF Research Roles and Responsibilities</u> require Department Research Administrators (Administrative Staff) to provide a variety of information and monthly financial reports to Principal Investigators, central administration, and auditors.

GEMS & FAST Queries Overview:

There are several ways to retrieve data from the PeopleSoft/Oracle databases. One method of retrieving data is by running a Public Query. Using this method you can run a query to an EXCEL spreadsheet. Once the data has been run to EXCEL you can review the fields and modify the data to fit your needs.

Note:

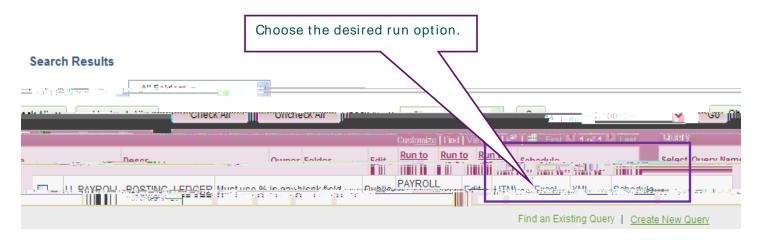
Search Results are displayed with various "run" options. Click the link on the row of the query for the desired run option:

HTML: Click to generate an HTML version of the query.

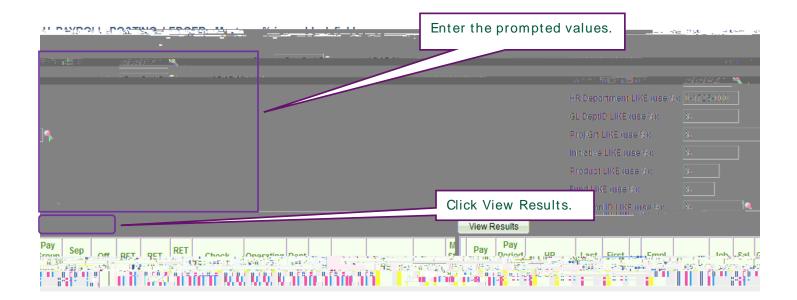
Excel: Click to download the query to a Microsoft Excel spreadsheet.

XML: Click to download query result to browser as webrowset format. There are options that enable you to open, save, or cancel the downloaded file.

Schedule: Click to schedule a time for the query to run.



Many public queries are designed to prompt the user for additional information to complete the query criteria (date parameters, department/chartfield information, etc.). Once the required information is provided, the query can be run. Click View Results.



Note: Many queries allow the use of the % wildcard for all/multiple values.

GEMS Query: COMBINATION_CODE_LOOK_UP

Descr: Look up combo cds by CFVs

About this query:

This query returns the list of GEMS Combination Codes associated with the prompted information, used for salary distributions. User is prompted for FAST Dept ID, Project/Grant number, Product, Fund, Operating Unit, Initiative, and State Reporting Number. Requires the wildcard (%) for any non-defined prompts.

GEMS Query: U_PAYACTUALS

Descr: Must use % in any blank field

About this query:

This query provides comprehensive payroll reporting using versatile prompt values, serves as a highly detailed USF Payroll Register. The query can be run for multiple pay periods or just one. The query returns the biweekly payroll expense information as posted to FAST and any Retro Distribution (RET) related information, along with the GEMS Combo Codes and their associated Chartfield values. User is prompted for Min Pay Period End Date, Max Pay Period End Date, Pay Group, Empl ID, Empl Record, Operating Unit, Fund Code, Account (GL Account Code), FAST-GL DeptID, Product, Chartfield 1 (Initiative), Project/Grant number, Budget Entity, Fund Id, Job Code, Salary Administration Plan, and GEMS DeptID. Requires the wildcard (%) for any non-defined prompts.

Example:



Continued:

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GEMS Query: U_PAYROLL_POSTING_ABRIDGED

Descr: Must use % in any blank field

About this query:

This query provides abbreviated information on posted salary expenses. The query can be run for multiple pay periods or just one. The query returns the biweekly payroll expense information as posted to FAST and any Retro Distribution (RET) related information. User is prompted for Earliest Pay End Date, Latest Pay End Date, HR Department (GEMS DeptID), GL DeptID (FAST DeptID), Project/Grant number, Initiative, Product, Fund, and Empl ID. Requires the wildcard (%) for any non-defined prompts.

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GEMS Query: U_PAY_DI STRI BUTI ON_DETAI LS

Descr: Pay Dist Info w/ prompts

About this query:

This query provides detailed pay distribution information. The query can be run for multiple fiscal years. User is prompted for From Date, To Date, GEMS DeptID, Operating Unit, Fund Code, FAST DeptID, Product, Initiative, Project/Grant number, Position#, Empl ID, Beginning Empl Record#, and Ending Empl Record#. Requires the wildcard (%) for most non-defined prompts, "0" and "999" should be used for non-specific Empl Rcd#, as appropriate.

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GEMS Query: U_ER_ADMIN_DEPT_DETAIL

Descr: PI INFO BY DEPT FOR UNCERT RPT

About this query:

This query provides PI Information for all "uncertified" effort reports (PERT reports) for a specified department and effort reporting period. User is prompted for DeptID (GEMS), Report Begin Date, and Report End Date. Use the % wildcard for multiple departments.

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GEMS Query: U_ER_ADMI N_REVI EW

Descr: Eff Rpts by Dept and Term

About this query:

This query returns a list of all generated effort reports (Pns1 191.6

GEMS Query: U_ER_ALT_CERTS_FOR_DEPT

Descr: CERTIFIERS FOR DEPT

About this query:

This query displays the current Allowable Certifier information for a specified department. User is prompted for DeptID (GEMS).

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GEMS Query: U_RET_STATUS_ERN_DETAIL

Descr: Status plus of RETs on Earns

About this query:

This query displays the Payroll Retroactive Expenditure Transfer (RET) Process Status and the amount of payroll earnings being transferred between combination codes, per the RET request. Addi

FAST Query: U_GM_ACT_DI RECT_I NDI RECT_COSTS

Descr: Prompt by Dept

About this query:

This query returns the PI, Sponsor, Award Begin Date, Award End Date, Direct and Indirect Costs. The user is prompted for a FAST DeptID.

Example:

Enter DeptID (%): 210700
View Results

Download results in : Excel SpreadSheet CSV Text File (47 kb)

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FAST Query: U_AM_PROPERTY_LIST

Descr: List My Assets by FAST Dept ID

About this query:

This query can be used to track department assets and assist Asset Management with annual inventories. The query returns associated FAST chartfield information, Tag #, Manu (Manufacturer), Descr (Description), Serial #, Location,

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FAST Query: U_AM_PROPERTY_LIST_BY_PROJ

Descr: List My Assets by FAST Project

About this query:

This query can be used to track project assets and assist Asset Management with annual inventories. The query returns associated FAST chartfield information, Tag #, Manu (Manufacturer), Descr (Description), Serial #, Location,



FAST Query: U_GM_AWARD_PI_CPI

Descr: PI and CoPI Project Info

About this query:

This query can be used to lookup all sponsored projects, where an employee has been assigned the Project Role of PI or CPI (CoPI). The query returns EmpIID, Name, Project Role, Project ID, Award Title, Project Description (short), Award Begin Date, Award End Date, Sponsor Name, Funding Type, and Status (Project Status). Requires the wildcard (%) for any non-defined or partially-defined prompts.



FAST Query: U_GM_FIND_MY_GFA

Descr: Find RFM Contacts for a Grant

About this query:

FAST Query: U_GM_KK_ENDDT

Descr: Check the KK end date for Proj

About this query:

FAST Query: U_GM_LI ST_UNDERWRI TES

Descr:

About this query:

This query lists initial and bridge underwrite information. The query displays, Type, PI Name, Project Title, Proposal ID,

FAST Query: U_GM_PAYMENTS_RECEIVED

Descr:

FAST Query: U_GM_VCHR_BUD_EXCPTN_BY_DEPT

Descr: Vchr bud excptns w dept prompt

About this query:

Example:

This query returns a list of current voucher budget exceptions (budget checking errors) related to grants. Provided information includes accounting date, award end date, commitment control end date, received date, invoice date and gross amount for the entire voucher.

The query prompts for a department using a 'like' expression (use a partial department number and %).

Department like (use %): 21% View Results Download results in : Excel SpreadSheet CSV Text File (7 kb) View All First (1-13 of 13) Last

FAST Query: U_GM_VOUCHER_ACTI VI TY

Descr: Voucher Activity for a Proj

FAST Query: U_GM_PRODUCTI ON_LI ST

Descr: List of Award Milestones

About this query:

This query provides project financial milestone information (i.e., final invoice and report due dates, completion dates and comments). By prompt, the user is asked to provide the Project ID (use the % wildcard for multiple projects), FAST DeptID (use the % wildcard for multiple DeptIDs), and Campus (use the % wildcard for all campuses).



FAST Query: U_PCARD_CHGS_POSTED_PROJ

Descr: PCard charges posted by projec

About this query:

This query lists PCard charges and associated chartfield information for a specific Project. The user is prompted for Project (Project ID).

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Project #; 6123108800Q	
View Results	
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FAST Query: U_WORKFLOW_ROUTING

Descr: Req Approvers & Managers

About this query:

This query lists all personnel assigned the Purchasing roles of Req_Approver or Req_Manager for a given Project ID. The user is prompted to provide a Project ID (use the % wildcard for multiple projects, %Chartfield%).

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Enter %Chartfield%: 1725104100			
View Results			
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FAST Query:

FAST Query:

GEMS Department Summary Report: The Department Summary Report provides a detailed view of how

Step 5 The Report Manager opens to the List page; this is the delivered PS default. Click the Administration tab.

Step 7 The report appears as an Adobe document. The page can now be printed or saved to file.

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