

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

TRAIN® Depot: <http://www.research.usf.edu/TRAIN/finanAdminTech.asp>

MyUSF Portal site: <https://my.usf.edu/>

COS/Pivot: <http://pivot.cos.com/>

USF Finance Mart: <https://eusf.admin.usf.edu/Topics/Applications/Queryland/Pages/default.aspx>

Research Reports: <https://reports.research.usf.edu/Report/>

Payroll Bi-Weekly Schedule: <http://www.usf.edu/business-finance/controller/payroll/payrollcertsschedules.aspx>

TRAIN® HelpOne Service Center: 813-97-HELP1 (813-974-3571); TRAIN@usf.edu

The [USF Research Roles and Responsibilities](#) require Department Research Administrators (Administrative Staff) to provide a variety of information and monthly financial reports to Principal Investigators, central administration, and auditors.

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.

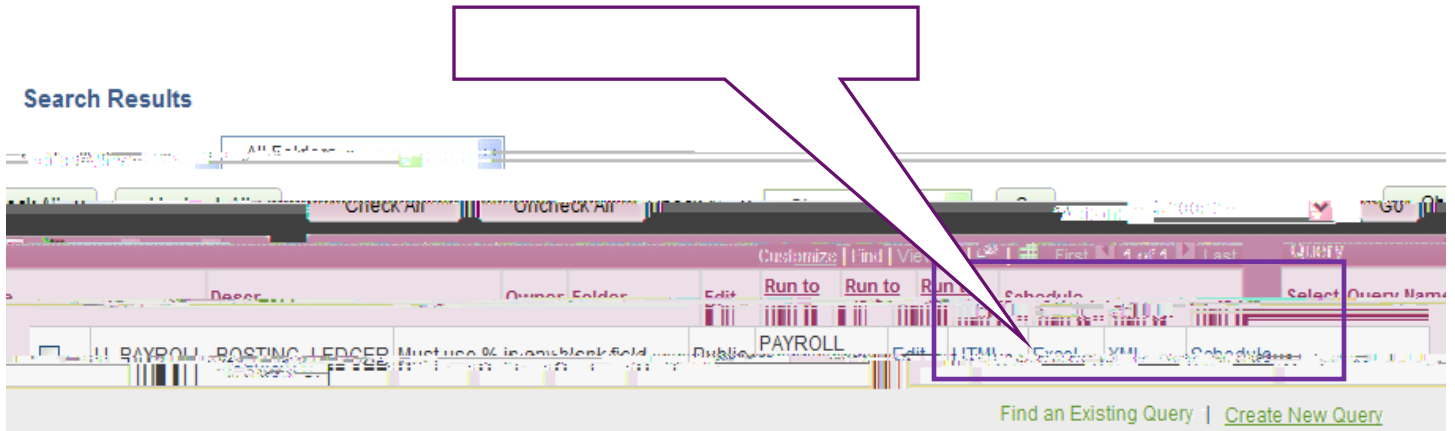
Search Results are displayed with various "run" options. Click the link **on the row of the query** for the desired run option:

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

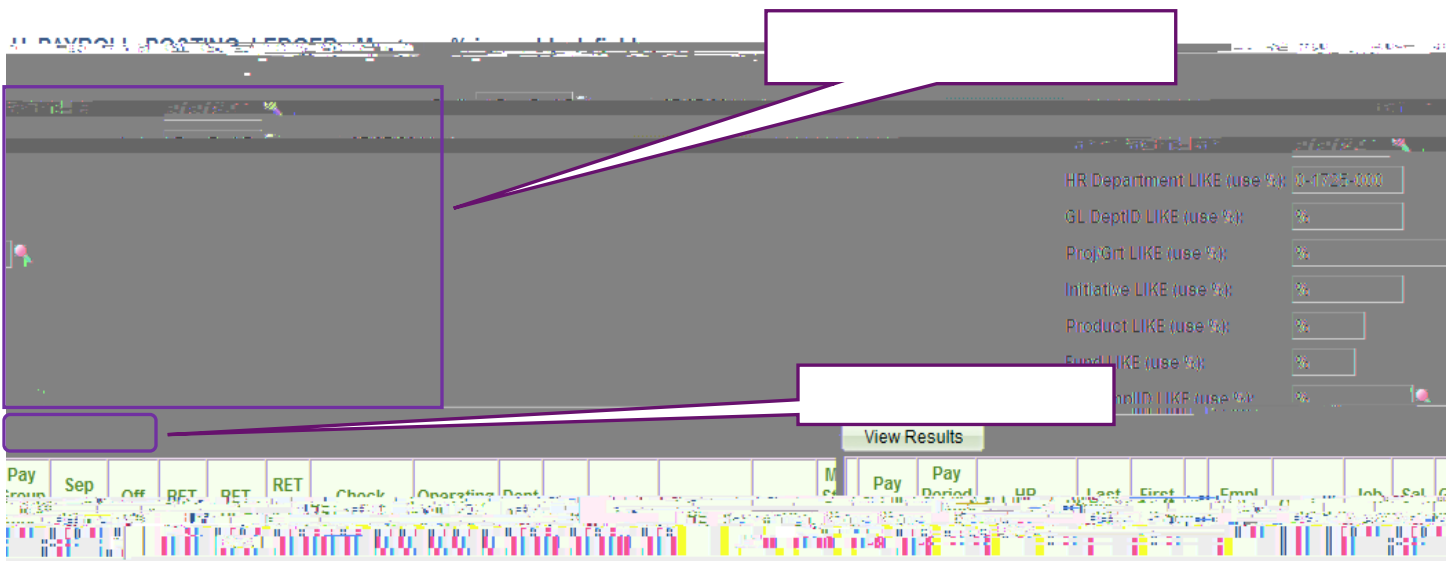
Excel: Click to download the query to a Microsoft Excel spreadsheet.

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.



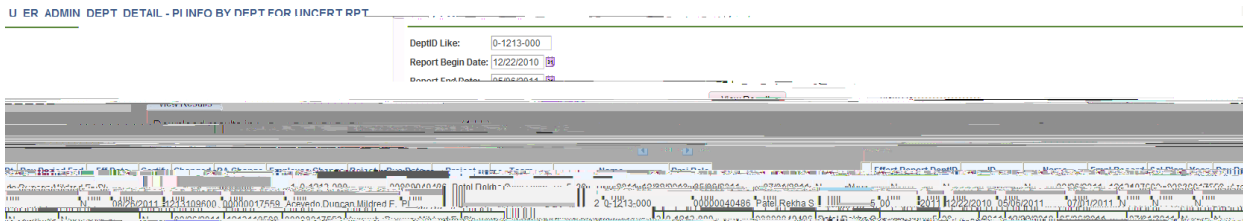
Many queries allow the use of the % wildcard for all/multiple values.

Look up combo cds by CFVs

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.

PI INFO BY DEPT FOR UNCERT RPT

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.



Eff Rpts by Dept and Term

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

CERTIFIERS FOR DEPT

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

U_ER_ALT_CERTS_FOR_DEPT - CERTIFIERS FOR DEPT

Dept ID: 0-1213-000

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

Rate	Effort Report End Date	Year	Certifier's ID	Certifier Name	Certifier Descr	Dept ID	ID	Employee Name	Empl Record	Sal Plan	Effort Report Begin D
	05/06/2011	2011	00000017559	Acevedo,Durcan,M/W/ed F	PL/CI	1	0-1213-000	00000040486	Patel,Rekha S	5.00	12/22/2010

Status plus of RETs on Earns

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

Prompt by Dept

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

Enter DeptID (%):

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

View All First 1-83 of 83 Last

Department	Direct	Indirect	Award	Award End	PI	Sponsor	Begin Date	End Date	Cost			
20764.80	1038.24	21803.04	10281003	1	1028100301	Mathematics & Science Teach	A	01/31/2005	07/31/2006	Meisels, Gerhard G	Florida Dept of Educ	
0.00	0.00	0.00	CHEMICAL				09/15/1998	01/31/1999	0.00	0.00	0.00	National Science
0.00	0.00	0.00	CHEMICAL									National Science
248 Source Agency												

List My Assets by FAST Dept ID

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,

U:\M\PROPERTY LIST - U.S. Army - FAST Dept ID

DeptID: 211700

Download results: 441 (441)

First: 01/01/2008 Last: 08/08/2003

DEPTMNT	MANUFACTURER	DESCRIPTION	SERIAL #	TAG #	DATE ACQ	DATE RET	STATUS	LOCATION	QUANTITY
00 000000	DELL	SERVER	91YROF1	CUT0208	0.000	01/01/2008	N	USF01 TPA 211700	183
70 000000	DELL	LAPTOP COMPUTER	J62H9K1	CUT0242	0.000	02/28/2012	N	USF01 TPA 211700	183
70 000000	HEWLETT PACKARD	LASERJET PRINTER	JPRCB1W01W	CUT0244	0.000	03/25/2010	N	USF01 TPA 211700	183
00 000000	DELL	SERVER	JZL0931	CUT0208	0.000	01/01/2011	N	USF01 TPA 211700	200



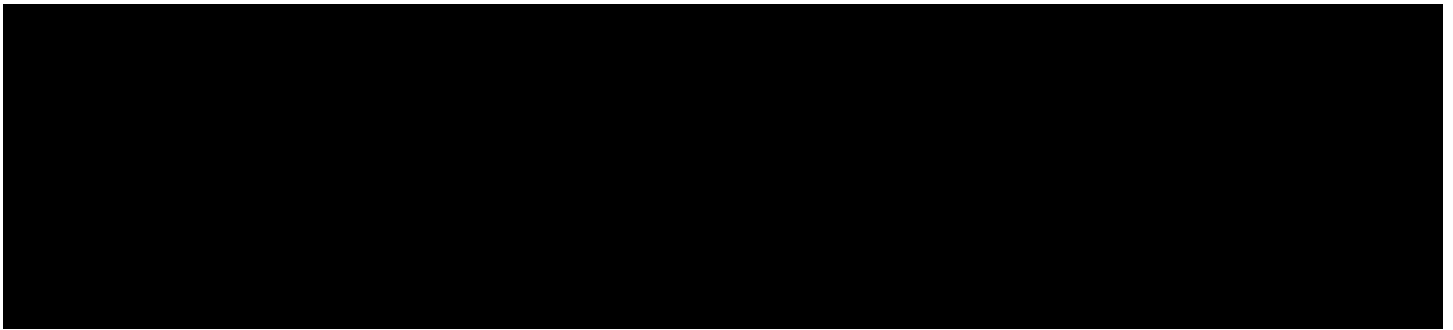
List My Assets by FAST Project

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,



PI and CoPI Project Info

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 EmplID, 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.



Find RFM Contacts for a Grant

Check the KK end date for Proj

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

Vchr bud excptns w dept prompt

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 %):

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) (7 kb)

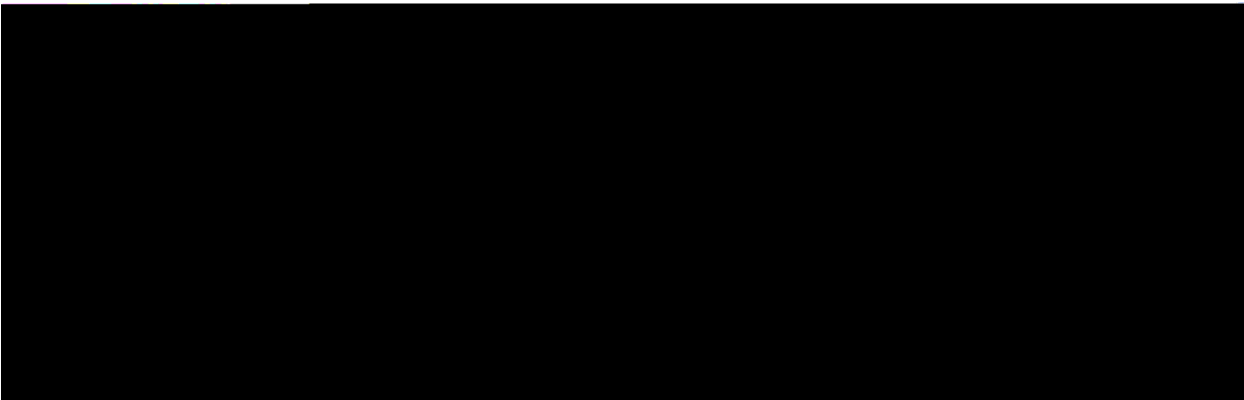
[View All](#) First 1-13 of 13 Last



Voucher Activity for a Proj

List of Award Milestones

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).



Req Approvers & Managers

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%).

Chartfield	Full Name	User ID	Role Name
1725104100	Lisa Lopez	LMI0PE7	Req Manager
1725104100	Robert Lunn	LMI0PE7	Req Approver

The Department Summary Report provides a detailed view of how

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

tab.

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

Report ID: U_PAYS1		GEMS DEPARTMENT PAY DISTRIBUTION SUMMARY							Page No. 1 Run Date 11/09/2011		
000013560	100	172500	50040	TPA	10000	000000	000000	172500000	08/19/2011	N	2012
000013560	100	172500	50040	TPA	10000	000000	000000	172500000	07/01/2011	N	2012
000013560	100	172500	50040	TPA	10000	000000	000000	172500000	000000	000000	172500000

The [Research Reports](#) are published by USF Research & Innovation Sponsored Research. If you have any questions or concerns regarding any report information please email rsch-reportsmail@usf.edu.

