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: Most USF public queries begin with "**U**_" to indicate that the query was developed by USF. In FAST, USF developed public queries beginning with "**U**_**GM**" report information for the Grants Module.

To find a public query, navigate to the Query Manager in either GEMS or FAST via MyUSE:

Reporting Tools > Query > Query Manager

To short cut through the alphabetized search results, enter the **Query Name** or partial name, for example, "**U**_" in the **Search By:** begins with field. Click the **Search** button.

		Navigate to the Query Manager.
OR/	ACLE'	
Favorites	Main Menu > Reporting Tools > Query > Query Manager	
Query M	anager	Enter the Query Name.
Enter any i	nformation you have and click Search. Leave fields blank for a list of all values Find an Existing Query <u>Create New Query</u>	a.
*S Sear	earch By: Query Name begins with U_PAYRe Advanced Search	OLL_POSTING_LEDGER
	Find an Existing Query Create New Query	Click Search.

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.

		Choose the des	ired r	un option						
Searc	ch Results			$\overline{\langle}$						
	*Folder View: All Folders	*			\backslash					
Ch	Uncheck All			*Action:	\checkmark	<u>۶-</u>	•	Go		
Query	1					vtomize	I Find I V	iew All I 🗗	First 🛙 1 of	Last
Select	Query Name	Descr	<u>Owner</u>	Folder	<u>Edit</u>	R to HTM	Run to Excel	Run to XML	Schedule	
	U_PAYROLL_POSTING_LEDGER	Must use % in any blank field	Public	PAYROLL LEDGERS	<u>Edit</u>	<u>HTML</u>	Excel	<u>XML</u>	<u>Schedule</u>	

Find an Existing Query | Create New Query

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.

The <u>GEMS/Payroll Bi-Weekly Schedule</u> provides Pay Period, GEMS RSA Check, Pay Distribution, and FAST payroll posting dates.

Pay F Cyc	Period	Pay Da	Period ates	Pay Dates	Appointme nt Guarantee	Pay	roll Certificatio	ons	Payroll Confirm	GEMS RSA Check	Pay Distribution	Posting to FAST!!
Note s	Pay Perio d #	Pay Perioc Begir Date	Pay Period End Date	Pay Date	Deadline to Submit Appointme nt Forms to HR	On-line Certs made available 10:00 AM	Mini-Certs 10:00-10:30 (Certs Not Available), and 3:00 PM Certs final deadline	Last Day to Submit Payroll Adjustment Forms, 5:00 PM deadline	Payroll Confirm (Target Time 9:00 AM)	Start GEMS RSA Check & Account Code Validation <i>(After Payroll is</i>	Pay Distribution , RSA Check & Account Code Validation	FAST!! Posting Viewable by Depts / Pay Data Available for Effort
APC	1627	06/17/1	06/30/16	07/08/16	05124116	06/27/16	06123116	06130116	07/05/16	07/05/16	07/06/16	07/11/16
	1701	07/01/1	07/14/16	07/22/16	06/24/16	07/11/16	07/14/16	07/15/16	07/19/16	07/19/16	07/20/16	07/25/16
	1702	07/15/1	07/28/16	08/05/16	07/01/16	07/25/16	07/28/16	07/29/16	08/02/16	08/02/16	08/03/16	08/08/16
	1703	07/29/	08/11/16	08/19/16	07/01/16	08/08/16	08/11/16	08/12/16	08/16/16	08/16/16	08/17/16	08/22/16
	1704	08/12/1	08/25/16	09/08/16	07/23/16	08/22/16	08/25/16	08/26/16	08/30/16	08/30/16	08/31/16	09/05/16
*	1705	08/26/1	09/08/16	09/16/16	08/19/16	03106116	09/08/16	09/09/16	09/13/16	09/13/16	09/14/16	09/19/16
	1706	09/09/1	09/22/16	09/30/16	09/02/16	09/19/16	09/22/16	09/23/16	09/27/16	09/27/16	09/28/16	10/03/16
	1707	09/23/1	10/06/16	10/14/16	09/16/16	10/03/16	10/06/16	10/07/16	10/11/16	10/11/16	10/12/16	10/17/16
	1708	10/07/1	10/20/16	10/28/16	09/38/16	10/17/16	10/20/16	10/21/16	10/25/16	10/25/16	10/26/16	10/31/16
	1709	10/21/1	11/03/16	11/10/16	10/14/16	10/31/16	11/03/16	11/04/16	11/08/16	11/08/16	11/09/16	11/14/16
APC	1710	11/04/1	11/17/16	11/23/16	10/28/16	11/10/16	11/15/16	11/16/16	11/18/16	11/18/16	11/13/16	11/28/16
	1711	11/18/1	12/01/16	12/09/16	11/11/16	11/28/16	12/01/16	12/02/16	12/06/16	12/06/16	12/07/16	12/12/16
APC	1712	12/02/1	12/15/16	12/23/16	11/16/16	12/09/16	12/13/16	12/14/16	12/16/16	12/16/16	12/13/16	12/22/16
APC	1713	12/16/1	12/29/16	01/06/17	11/16/16	12/13/16	12/21/16	12/22/16	01/03/17	01/03/17	01/04/17	01/09/17
APC	1714	12/30/1	01/12/17	01/20/17	12/15/16	01/09/17	01/11/17	01/12/17	01/17/17	01/17/17	01/18/17	01/23/17
	1715	01/13/1	01/26/17	02/03/17	01/06/17	01/23/17	01/26/17				02/01/17	02/06/17
	1716	01/27/1	02/09/17	02/17/17	01/20/17	02/06/17	AL AL	_	_		45/17	02/20/17
	1717	02/10/1	02/23/17	03/03/17	02/03/17	02/20/17	Refer	to the ap	propriat	te GEMS		03/06/17
	1718	02/24/	03/09/17	03/17/17	02/17/17	03/06/17	Payro	ll Bi-Wee	kly Sche	edule to		03/20/17
	1719	03/10/1	03/23/17	03/31/17	03/03/17	03/20/17	obtaiı	1 the Pav	Period I	End Date	s. Z	04/03/17
	1720	03/24/	04/06/17	04/14/17	03/17/17	04/03/17						04/17/17
	1721	04/07/1	04/20/17	04/28/17	03/31/17	04/17/17	04720	1			04/26/17	05/01/17
	1722	04/21/1	05/04/17	05/12/17	04/11/17	05/01/17	05/04/17	UJIOST		05/09/17	05/10/17	05/15/17
	1723	05/05/1	05/18/17	05/26/17	04/11/17	05/15/17	05/18/17	05/19/17	05/23/17	05/23/17	05/24/17	05/29/17
*	1724	05/19/1	06/01/17	06/09/17	05/12/17	05/30/17	06/01/17	06/02/17	06/06/17	06/06/17	06/07/17	06/12/17
	1725	06/02/1	06/15/17	06/23/17	05/23/17	06/12/17	06/15/17	06/16/17	06/20/17	06/20/17	06/21/17	06/26/17
	1726	06/16/1	06/29/17	07/07/17	05/23/17	06/26/17	06128117	06/23/17	07/03/17	07/03/17	07/05/17	07/10/17

U_PAYROLL_POSTING_LEDGER - Mustures % in any blank field

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	Earliest Pa	ay-End-D	Date:	07/14	/16																			
	Latest Pay	-End-Da	ate:	07/14	4/16																			
	HR Depart	ment Ll	KE (use %):	0-1725	-000]																		
	GL DeptID	LIKE (us	se %):	%																				
	Proj/Grt Lll	KE (use	%):	%			Q																	
	Initiative L	IKE (use	e %):	%																				
	Product LI	KE (use	: %):	%																				
	Fund LIKE	(use %):	:	%																				
	and Empli	D LIKE (I	use %):	%																				
	View Re	sults)																					
	Pay Period No.	Pay Period End I Date	HR Department	Last Name	First Name	ID	Empl Record	Position	Job Code	Sal Plan	Pay Group on Job	Sep Check Nbr	Off Cycle	RET Seq#	RET Status	RET BC Date	Check CorrectedDt	Operating Unit	Dept ID	Fund	Product	Chartfield1	Project	N St R

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.

Example:

со	MBINATION_C	ODE_LOC	K_UP - Look up c	ombo cds by CF\	's						_		
FAS	F Dept ID: %	Q											
Proj	Grt Like: 17251	04100	Q										
Pro	Like: %												
Euro	llike: %												
	- 11-14 L 11-1-												
Ope	r Unit Like: 1%												
Initia	itive Like: %	Q											
Stat	e Rpt Num: %												
V	ew Results												
D	wnload results	in Excel	SpreadSheet CSV Tex	d File XML File (4	kb)								
				arne marine (1								First	1 12 of 12
viev	/ All						,					T li at la	1013 01 13 P Cast
	Eff Date	Status	State Rpt Num	Combo Code	Descr	Acct	Acct Description	Dept ID	Project	Product	Fund	Oper Unit	Chartfield1
1	07/20/2009	A	1725124L0	000180570	TOOLS OF THE MIND: PROMOTING	50021	Administration	172500	1725104100	000000	20000	TPA	0000000
2	07/20/2009	A	1725124L0	000180571	TOOLS OF THE MIND: PROMOTING	50700	Health	172500	1725104100	000000	20000	TPA	0000000
3	07/20/2009	A	1725124L0	000180572	TOOLS OF THE MIND: PROMOTING	50710	Retirement	172500	1725104100	000000	20000	TPA	0000000
4	07/20/2009	A	1725124L0	000180573	TOOLS OF THE MIND: PROMOTING	50720	Life	172500	1725104100	000000	20000	TPA	0000000
5	07/20/2009	A	1725124L0	000180574	TOOLS OF THE MIND: PROMOTING	50725	Other	172500	1725104100	000000	20000	TPA	0000000
6	07/20/2009	A	1725124L0	000180575	TOOLS OF THE MIND: PROMOTING	50730	Taxes	172500	1725104100	000000	20000	TPA	0000000
7	07/20/2009	A	1725124L0	000180576	TOOLS OF THE MIND: PROMOTING	50022	Faculty	172500	1725104100	000000	20000	TPA	0000000
8	07/20/2009	A	1725124L0	000180577	TOOLS OF THE MIND: PROMOTING	50023	Staff	172500	1725104100	000000	20000	TPA	0000000
9	07/20/2009	A	1725124L0	000180578	TOOLS OF THE MIND: PROMOTING	50040	OPS	172500	1725104100	000000	20000	TPA	0000000
10	07/20/2009	A	1725124L0	000180579	TOOLS OF THE MIND: PROMOTING	50735	OPS Taxes	172500	1725104100	000000	20000	TPA	0000000
			170510110	000400500	TOOLO OF THE MIND, PROMOTING	50044	Cred Aget	170500	1705104100	000000	20000	TDA	0000000

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:

U_PAYACTUALS - Mu	st use % in a	any blank	field																									^
Min Pay Period End Date:	p7/07/2011 [1																										
Max Pay Period End Date:	07/07/2011																											
Pay Group:	%																											
Empl ID:	%																											
Empl Record:	96																											
Operating Unit:	%																											
Fund Code:	96																											
Account:	%																											
FAST-GL DeptID:	%																											
Product:	%																											
Chartfield 1:	%																											Ξ
Project/Grant:	1725104100																											
Budget Entity:	%																											
Fund Id:	96																											
Job Code:	%																											
Salary Administration Plan	: %																											
GEMS DeptID:	%																											
View Results																												
Download results in :	Excel Spread	Sheet CSV	Text File XML	.File (1	11 kb)																							
View All																												
Co Group Pay Perio	^d Page Line Nbr C	Off ycle Sep Check Nbr	ID	First Name	Last	Empl Record	HR Department	Position	Job Code	CA GL Run	Pay eriod	Reversed	Year	Period	Combo Code	Operating Unit	Fund	Acct	Dept ID	Product	Chartfield1	Project	Bud Ent	Fund Id	State Rpt Num	U Dist Source	U Dist Code1	U Di
1 USF POH 07/07/201	1 320 4 N	0	00000068119	Anna Paula	Da Silva	2	0-1725-000		9190	Y 12	201 1	N	2011	12	000180578	TPA	20000	50040	172500	000000	0000000	1725104100	48900700	655006	1725124L0	ERN- DIST	REG	
2 USF POH 07/07/201	1 320 4 N	0	00000068119	Anna Paula	Da Silva	2	0-1725-000		9190	Y 12	201 1	N	2012	1	000180578	TPA	20000	50040	172500	000000	0000000	1725104100	48900700	655006	1725124L0	ERN- DIST	REG	

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æ	First Name	Last	Empi Hill Record Department	Position	Job Code	GL p	Pay	Revenued	Year	Period	Combe Code	Operating SNH	Fund	Acct	Dept 10	Product	Charthelet	Project	Bod Eve	Fuest M	State Rpt Hum	U Det Source	U Diet Cadet	ii Dist Code2	ti Diež Code3	0 Diet Amount	Dest Sequence	Diei Status	Pary End p	Post Sat	1
018115	Anna Paula	Dativa	2 8-1725-000		8190 1	1	201	N.	2011	- 12	000100578	TPA	20000	50040	172500	000000	0000000	1720104100	48900700	850008	1725124L0	6994- DIST	REG			0000	0	93 -		54 09	
(05811)	Anna Paula	Dativa	2 8-1725-000		8190 1	1	201	N.	2012	1.1	000180578	TPA .	20000	50040	172500	000000	0000000	1725104100	48900700	155336	1725124.0	ER6- DIST	REÓ			0000	0	0		45 09	

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.

Example:

U_PAY	ROLL_POST	ING_ABRI	DGED - Mu	stuse % in a	ny blank field	1														
Earliest	Pay-End-Date:	07/07/2	011 🔍																	
Latest P	ay-End-Date:	07/07/2	011 🔍																	
HR Depa	rtment LIKE (us	e %): %																		
GL Depti	D LIKE (use %):	%																		
Proj/Grt	.IKE (use %):	172510	4100	۹																
Initiative	LIKE (use %):	%																		
Product	LIKE (use %):	%																		
Fund LIK	E (use %):	%																		
and Emp	IID LIKE (use %)	: %	۹,																	
View F	tesults																			
Down	oad results i	n : Excel Sp	readSheet C	SV Text File XM	LFile (1 kb)															
View All																			First	14 🕞 Last
PP#	PP End Date	Last Name	First Name	ID	Empl Record	Position	Job Code	Sal Plan	FTE	Fund	Product	Initiative	Project	% Dist	Comp Rate	Total pay	Total Fringes	Total Amt	Operating Unit	Dept ID
1 1201	07/07/2011	Arango	Liza	00000071955	1		9182	05	0.500000	20000	000000	0000000	1725104100	100	793.046154	793.05	0.00	793.05	TPA	172500
2 1201	07/07/2011	Da Silva	Anna Paula	00000068119	2		9190	09	0.500000	20000	000000	0000000	1725104100	100	30.000000	1087.50	0.00	1087.50	TPA	172500
3 1201	07/07/2011	Lopez	Lisa	00000052776	600	00013486	9003	22	0.600000	20000	000000	0000000	1725104100	62	2041.076923	1700.58	264.78	1965.36	TPA	172500
4 1201	07/07/2011	Melanson	Megan	00000083660	1		9190	09	0.500000	20000	000000	0000000	1725104100	100	10.000000	400.00	5.80	405.80	TPA	172500

GEMS Query: U_PAYROLL_POSTING_LEDGER

Descr: Must use % in any blank field

About this query:

This query provides moderately detailed 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.

Example:

Carlient P	wy-End-Detec	0707	D2011 Q.																										
atest Pe	y-End Date:	(\$7.6)	rgio11 4.																										
R Depar	tment LIKE (s	100 5.2 5																											
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hugan	RE June NE	1728	104100	- 14.																									
stative	INE trees to 240.	14																											
Product	NE taxe 53:	16																											
und LRI	Date No.	14																											
and Empl	and share the second second	in line																											
	AD LONG, DANKE 7	NO 176		a, -																									
View R	esults	60 (N		a,																									
Ven R Downi	esults ad results	in Excel	SpreadUne	4. e: cs)	Ted File 108	rm 6	4 kD)																						
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View R Downs Verw Al Page No.	Pay Period End Date	in : Excel HR Department	Last	er CS) First Name	Cantin 336. 10	Eine (*	4 kD) Position	Job Code	Sal	Pay Group	Sep Check Nor	Off	RET	RET Status	RET BC Date	Check	Operating	Coupt 10	Fund	Product	Charitheid	Project	Max State Rpt Nam	Comp Rate	Distribution %	AAP	Faculty Earning	Faculty Adjunct Earnings	USPS Earnings
View R Downie Verw Ait Parson No. 1 1201	Pay Period End Date 07070011	IN ELOIL	Last Rame Arange	A E CD Hest Name	(Tastfile 336) 10 00000071915	Empl Record	4 kD) Position	Job Code	Sol Plan	Pay Group Job	Sep Check NBr	Off Cycle	RET Sog#	RET Status	RET BC Date	Check CorrectedD	Operating Unit	Ovept 10	Fund 20000	Product	Charitle671	Project	Max State Rpt Nam 1725124L3	Comp Rate	Distribution %	AAP Lamenga 0.00	Faculty Earning	Faculty Adjunct Earnings 0.00	USPS Earnings
Vee B Down9 Vee Al Pag Page Box 1 1201 2 1201	Pay Period End Celul End Celul End Celul End Celul End Celul	IT ELOS IN ELOS Department 0-1725-000 0-1725-000	Last Rame Arange Da Sha	Regel Name Lica Anna Paula	ExtEne 336	Ein (* Record 1 2	4 kD) Position	300 Code 1112 2122	Sal Plan 05	Pary Group on Job FOS	Seg Check Nor 0	Off Cycle Ni Ni	HET SogP 0	RET States 0	ALT BC Date	Check CorrectedD	Operating Usel TPA. TPA.	Dept 10 172500 172500	Fund 20000	Product 000000	Charitle601	Project 1725104100 1725104100	Max State Rpt Nam 1725124L3 1725124L3	Comp Rate	Distribution % 100 100	AAP Eamings 0.00 0.00	Faculty Earning 0.00	Faculty Adjunct Earnings 9.00 0.00	USPS Earnings 8.00 8.00
Veen R Down9 Vere At Pay Pariot No. 1 1201 2 1201 3 1201	Pay Period End Celul 07/07/2011 07/07/2011	IN Excel HR Department 0-5725-000 0-1725-000 0-1725-000	Last Rame Arange Da Silva Lopez	Part CDA	Exection 208.	Ein (* Empl Record 1 2 500	4 kb) Positice	Job Code 9192 9190 9003	Sal Plan 05 09 22	Pay Sroup on Jub POS POS	Seg Check Ner 0 0 0	Off Cycle Ni Ni	HET Soge 0 0	RET Statum 0	RET BC Date	Check CorrectedD	Coercading Unit TPA. TPA. TPA.	Dupt 10 172500 172500	Fund 20000 20000	Product 000000 000000	Charifield1 0000000 0000000	Project 1725104100 1725104100	Max State Rpt Nam 1725124L8 1725124L8 1725124L8	Comp Rate	Distribution % 100 100 62	44P Eamings 9.00 9.00	Faculty Escring 2.00 2.00	faculty Adjunct Earnings 100 100	0395 Earsings 100 000

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1725	00 2000	00 00	00000	0000005	1725104100	1725124,0		100	0.00	8.00	8.00	0.00	0.00	0.00	0000	0.90	0.99	0.99	0.98	0.00	0.99	0.00	0.00	0.00	0.00	0.00	0.90	0.00	-0000	Y.
1725	00 2000	00 00	00000	0000000	1725104100	1725124L0	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	100	0.00	0.00	0.00	0.00)0000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	00000	٣
1725	00 2000	00 00	10000	0000000	1725104100	17251246.0		1 12	0.00	10000	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			0.00	0.00	0.00		¥.
1725	00 2000	00 00	00000	00000005	1725104100	1725124L0	0000000	100	0.00	0.00	0.00	0.00	20000	0.00	0.00	0.00	0.00	0.98	0.00	0.00	0.00	0.00	0.00	0.00	5.80	0.00	0.00	0.00	0000	Ψ.

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GEMS Query: U_PAY_DISTRIBUTION_DETAILS

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.

U_P	AY_DISTRIB	UTION	_DETAILS - Pay Dist Info w/	prompts										_			
Fron	n Date:		08/01/2011 🛐														
To D	late:		09/01/2011 🛐														
GEM	IS DeptID Like (%	-All):	0-1725-000														
Op L	Jnit Like (%-All):		96														
Fund	d Like Like (%-All):	%														
Dept	tID Like (%-All):		%														
Proc	d Like (%-All):		%														
Initia	ative Like (%-All):		96														
Proj	/Grt Like (%-All):		96														
Posi	ition # Like (%-Al	I):	96														
Emp	lid Like (%-All):		%														
Beg	Empl Rcd# (Use	0 for All): 0														
End	Empl Rcd#(Use	999 for <i>i</i>	AII): 999														
Nam	ne Like (%-All):		%														
Vi	ew Results																
Do	wnload result	ts in :	Excel SpreadSheet CSV Text File	XML File (283	kb)												
View	/ All														F	irst 📢 <u>1-100</u>	of 704 🕨 Las
	Dept ID	Year	Name	ID	Empl Record	Position	Bdgt Level	Pay Status	Dist Eff Dt	Combo Code	Distrb %	Project	Operating Unit	Fund	Dept ID	Product	Initiative
1	0-1725-000	2012	Adair,Andrea Leigh-Lesley	00000084212	1		A	A	08/07/2011	000102426	100.000		TPA	10000	172500	000000	0000000
2	0-1725-000	2012	Adams,Carolyn D	00000085329	1		A	A	07/22/2011	000102429	100.000		TPA	13000	172500	000000	0000000
3	0-1725-000	2012	Adams,Carolyn D	00000085329	1		A	A	08/05/2011	000102426	92.000		TPA	10000	172500	000000	0000000
4	0-1725-000	2012	Adams,Carolyn D	00000085329	1		A	A	08/05/2011	000102429	8.000		TPA	13000	172500	000000	0000000
5	0-1/25-000	2012	Adams,Carolyn D	00000085329	1		A	A	08/19/2011	000102426	100.000		IPA	10000	1/2500	000000	0000000

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.

U_ER_ADMIN_DEF	T_DETAIL -	PI INFO BY	DEPT FOR I	JNCER	TRP	г												
DeptID Like: 0-1	213-000																	
Report End Date: 05/	06/2011																	
Download results	in : Excel Spre	adSheet CSV	Text File XML	File (1	kb)													
View All																	First 🕢 <u>1-3 (</u>	of 3 🔊 Lasi
Effort Report DeptID	ID	Name	Empl Record	Sal Plan	Year	Pay Bgn Dt	Pay Period End	Eff Date	Certify	Changed	DA Change	Employee Change	Reject	Due Date	Project	Team	Name	Proj Role
1 0-1213-000	00000040486	Patel,Rekha S	5	00	2011	12/22/2010	05/06/2011	07/01/2011	N	N	N	N	N	08/26/2011	1213107600	00000017559	Acevedo Duncan,Mildred E	PI
2 0-1213-000	00000040486	Patel,Rekha S	5	00	2011	12/22/2010	05/06/2011	07/01/2011	N	N	N	N	N	08/26/2011	1213109600	00000017559	Acevedo Duncan,Mildred E	PI
3 0-1213-000	00000040486	Patel,Rekha S	5	00	2011	12/22/2010	05/06/2011	07/01/2011	N	N	N	N	N	08/26/2011	1213110500	00000017559	Acevedo Duncan,Mildred E	PI

GEMS Query: U_ER_ADMIN_REVIEW

Descr: Eff Rpts by Dept and Term

About this query:

This query returns a list of all generated effort reports (PERT reports) for a specified department and effort reporting period. User is prompted for DeptID (GEMS), Report Begin Date. Use the % wildcard for multiple departments.

U_EP	ADMIN_REVIEW	- Eff Rpts by Dept ar	nd Term								
Dept	D: 0-1213-000										
Repo Vie	t Bgn Dt: 12/22/2010 w Results										
Do	vnload results in :	Excel SpreadSheet CSV	TextFile XML File (12 kb)								
View	All									First 🧃 <u>1-5</u>	4 of 54 💽 Last
	Dept ID	ID	Name	Empl Record	Pay Bgn Dt	Pay Period End	Sal Plan	Certify	Changed	DA Change	Reject
1	0-1213-000	00000019851	Ostermann,Sharon D	Ę	5 12/22/2010	05/06/2011	00	Y	N	Y	N
2	0-1213-000	00000030730	Zaworotko,Michael	(12/22/2010	05/06/2011	22	Y	N	Y	N
3	0-1213-000	00000034377	Space,Brian	(12/22/2010	05/06/2011	22	Y	N	Y	N

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).

U_ER_ALT_CER	TS_FOR_DEPT	- CERTIFIERS FOR	DEPT							
Dept ID: 0-1213-000 View Results)									
Download resu	Its in : Excel Sprea	adSheet CSV Text File >	MLFile (1 kb)							First 1 1 3 of 3 1 1 and
Dept ID	ID	Employee Name	Empl Record	Sal Plan	Effort Report Begin Date	Effort Report End Date	Year	Certifier's ID	Certifier Name	Certifier Descr
1 0-1213-000	00000040486	Patel,Rekha S	5	00	12/22/2010	05/06/2011	2011	00000017559	Acevedo Duncan,Mildred E	PI-CPI
2 0-1213-000	00000040486	Patel,Rekha S	5	00	12/22/2010	05/06/2011	2011	00000017559	Acevedo Duncan,Mildred E	SUPERVISOR
3 0-1213-000	00000040486	Patel,Rekha S	5	00	12/22/2010	05/06/2011	2011	00000041669	Larsen,Randy W	DEPARTMENT CHAIR

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. Additionally the query details the RET Process Date, the Updated by user ID and Pay Date for Posting. User is prompted for Earliest Date Created, Run Control ID, Earliest PP Affected, Latest PP Affected, Empl ID, and GEMS DeptID. Requires the wildcard (%) for any non-defined prompts.

U_RET_STA	ATUS_ERN	LDETAI	L - Status	plus of RET	s on Earns																				
Earliest Date C	Created:	09/01/201	1 🕅																						
Run Cntl LIKE ((use %):	%																							
Earliest PP Aff	ected:	07/07/201	1 🔍																						
Latest PP Affe	cted:	07/07/201	1 🔍																						
EmpIID LIKE (u	ise %):	96	۹.																						
GEMS DeptID L	IKE (use %):	0-2117-00	10																						
View Result	s																								
Download	results in :	Excel Sp	readSheet	CSV Text File	XML File (2 kb)																				
View All																							Fir	st 📢 <u>1-4 of 4</u>	🕨 Last
Created	Run Cntl	Process State	Pay Period End	EmpliD	Name	Empl Record	Sep Check Nbr	Cycle	Period	Earn Code	OLD Acct Code	OLD Earnings	New Acct Code	New Amount	Selected for B.C.	Error	Earns End	Year	Fiscal Year	New Acct Period	RETdist PayDt	RET Process Dt	Updated By	PayDt for Posting	GEM S DeptiD
1 09/12/2011	0000003234	Editing	07/07/2011	00000011671	Kramer, Jeffrey H	0	0	N O	2	REG	000213693	424.38	000203271	31.76	Y	ок	06/30/2011	2012	2012	3	09/01/2011	09/12/2011	JHEATLEY	09/01/2011	0- 2117- 000
2 09/12/2011	0000003234	Editing	07/07/2011	00000011671	Kramer, Jeffrey H	0	0	N	2	REG	000213693	0.00	000213693	392.62	Y	ок	06/30/2011	2012	2012	3	09/01/2011	09/12/2011	JHEATLEY	09/01/2011	0- 2117- 000

FAST Query: U_GM_ACT_DIRECT_INDIRECT_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)

	w All								Fir	st ┥ 1-83 of	83 🕞 Last
	Project	Descr	Status	Award Begin Date	Award End Date	Award PI Name	Sponsor Name	Direct Costs	Indirect Costs	Total Costs	Contract
1	1028100301	Mathematics & Science Teach	A	01/31/2005	07/31/2006	Meisels,Gerhard G	Florida Department of Education	20764.80	1038.24	21803.04	10281003
2	2107003900	CHEMICAL ENGINEERING EIES-	I	08/15/1986	01/31/1989	Garcia-Rubio,Luis H	National Science Foundation	15180.00	2280.00	17460.00	21070039
3	2107004700	CHEMICAL ENGINEERING INT-8	I	02/15/1989	01/31/1992	Garcia-Rubio,Luis H	National Science Foundation	14180.00	1555.00	15735.00	21070047
4	2107005000	CHEMICAL ENGINEERING FIBER	1	09/01/1989	08/31/1990	Garcia-Rubio,Luis H	248 Source Agency Conversion Customer	7486.09	13.91	7500.00	21070050

FAST Query: AWARDS_BY_ENDDATE4

Descr: AWARD & BUDGET STATUS BY ENDDT

About this query:

This query lists all awards that will reach the end date (from contract line) within a given date range.

The query returns Project (Project ID), Project Title, Principal Investigator, Sponsor, Award Begin Date, Award End Date, the associated FAST chartfields, Budget, Pre-Encumbrances, Encumbrances, Expenses RSA-Budget Balance and Status. The user is prompted for Project (Project ID) like (use the % wildcard for multiple projects), Beginning and Ending End Dates, and Operating Unit (use the % wildcard for all).

WARDS_BY_E	ENDDATE4 - AWARD & I	BUDGET STATUS	BY ENDDT														
Project like (use %	for all): %																
Beginning End Dat	e: 12/01/2011 🖲																
Ending End Date:	03/01/2012 🛐																
Oper Unit like (use	% for all): TPA																
View Results																	
Download res	ults in : <u>Excel SpreadSheet</u>	<u>CSV Text File</u> (154)	kb)												First	◀ 1-100 of 207) Last
Project	Project Title	Principal Investigator	Sponsor	Awd Begin Date	Awd End Date	Unit	Oper Unit	Fund	DeptiD	Product	Initiative	Budget	Pre- Encumbrances	Encumbrances	Expenses	RSA- Budget Balance	Status
1 1001100700	KnowHow2Go Implementation Peri	Dosal,Paul J	The Lumina Foundation	01/01/2010	12/31/2011	USF01	TPA	22000	100100	000000	0000000	515600.00	0.00	42906.00	433571.63	39122.37	A
2 1001100700	KnowHow2Go	Dosal,Paul J	The Lumina Foundation	01/01/2010	12/31/2011	USF01	TPA	22000	100100	SUB00L	0000000	6000.00	0.00	0.00	0.00	6000.00	A

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,

Example:

U_AM_PROPERTY_LIST - List My Assets by FAST Dept ID

DeptID: 211700 View Results

Download results in : Excel SpreadSheet CSV Text File XML File (14 kb)

_				-				(· /													
Vie	w All																				First 📢	1-22 of 22 🕟 Last
	Unit	Op Unit	DeptID	Fund	Prod	Initiative	Proj	Tag #	Manu	Descr	Serial #	Location	Amount	Last Scan	Stat	Acq Dt	оср	Custodian	3009 Doc	PO No.	Vouch	Asst ID
1	USF01	TPA	211700	10000	000000	0000000		495000218829	DELL	DELL 410 TOWER SERVER		CUT0205	0.000	01/01/2011	I	07/30/1999	N					000000209972
2	USF01	TPA	211700	10009	000000	0000000		495000219394	DELL	DELL POWEREDGE 4300 SERVER		ENC1003	0.000	04/30/2007	I	08/31/1999	N					000000210162
3	USF01	TPA	211700	18300	000000	0000000		495000233399	DELL	DELL M50 LAPTOP COMPUTER		CUT0245	0.000	06/30/2007	I	10/31/2002	N					000000217621
4	USF01	TPA	211700	18300	000000	0000000		495000235331	HEWLETT PACKARD	H.P. 5500 HDN LASERJET PRINTER		CUT0249	0.000	02/29/2012	I	03/31/2003	N					00000218833
5	USF01	TPA	211700	18300	000000	0000000		495000239676	HEWLETT PACKARD	HP DESIGNJET 1055CM PRINTER PA	SG3BL1311W	CUT0140	0.000	12/31/2008	I	04/15/2004	N			0000024444	00097691	000000221357
6	USF01	TPA	211700	18300	000000	ENGCT02		495000241639	DELL	LAPTOP COMPUTER	H3J5V51	CUT0138	0.000	10/29/2004	I	10/29/2004	N			0000045448	00159168	000000222463
7	USF01	TPA	211700	18300	000000	DEPTMNT		495000254900	DELL	SERVER	91YROF1	CUT0208	0.000	01/01/2008	L	01/01/2008	Ν			0000120369	00472921	000000229672
8	USF01	TPA	211700	18370	000000	0000000		495000264002	DELL	LAPTOP COMPUTER	J62H9K1	CUT0242	0.000	02/28/2012	I	06/03/2009	N		х			000000273441
9	USF01	TPA	211700	18370	000000	ENGCT02		495000266193	HEWLETT PACKARD	LASERJET PRINTER	JPRCB1W01W	CUT0244	0.000	03/25/2010	I.	03/25/2010	N					00000280264
10	USF01	TPA	211700	20000	000000	0000000		495000237117	DELL	SERVER	JZL0931	CUT0208	0.000	01/01/2011	1	08/08/2003	N			000003517	00022953	000000219751

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,

Example:

U_AM_PROPERTY_LIST_BY_PROJ - List My Assets by FAST Project Project # (%): 2107% View Results Download results in : Excel SpreadSheet CSV Text File XML File (2 kb) First 🕢 1-3 of 3 🕟 Last View All Unit Op Unit DeptID Fund Prod Initiative Proj Serial# Location Amount Last Scan Stat Acq Dt OCP Custodian 3009 Doc PO No. Vouch Tag # Manu Descr Asst ID 1 USF01 TPA 210700 20000 000000 0000000 2107104700 495000270231 ULTRAPYC ENC3000 9992.500 08/13/2010 I 07/30/2010 N ULTRAFOAM PYCNOMETER 0000160531 00665011 000000300461 2 USF01 TPA 210700 20000 000000 0000000 2107104700 495000270231 ULTRAPYC ULTRAFOAM PYCNOMETER
 ENC3000
 9992.500
 08/13/2010
 I
 07/30/2010
 N

 210F20170
 ENB0118
 5108.170
 07/28/2010
 I
 N
 0000160531 000000300461 3 USF01 TPA 210700 22000 000000 0000000 2107104200 495000270943 TELEDYNE ISCO SYRINGE PUMP 0000159224 00658150 000000300617 N

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 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.

U GM AWARD	PI_CPI - PI and	CoPI Project Info

_											
E	mpl ID (use % for	blank): %									
L	ast Name (use %	for blank): MOHAPA	TRA								
F	irst Name (use %	for blank): S%									
	View Results										
	Download res	ults in : Excel Spr	eadSheet C	SV Text File	(ML File (31 kb)						
١	/iew All								Fi	rst 📧 <u>1-57 of 5</u>	Z 🕞 Last
	Empl ID	Name	Project Role	Project ID	Award Title	Project Description	Award Begin Date	Award End Date	Sponsor Name	Funding Type	Status
	1 00000025184	Mohapatra,Shyam S	PI	6108100000	Differentiation of Stem Cells to Blood Cells Using	Differentation of Stem Cells t	06/01/2009	05/31/2012	Office of Naval Research	FED	Active
-	2 00000025184	Mohapatra,Shyam S	PI	6108100001	Differentiation of Stem Cells to Blood Cells Using	Differentation of Stem Cells t	06/01/2009	05/31/2012	Office of Naval Research	FED	Active
;	3 00000025184	Mohapatra,Shyam S	PI	6108100100	Nanomedicine Research Center Core (NRCC)	Nanomedicine Research Center C	09/30/2009	08/31/2012	Natl Heart Lung and Blood Inst	FED	Active
	00000025184	Mohapatra,Shyam S	PI	6108100400	Micro-RNA Directed Generation of Blood Cells from Cord B	Micro-RNA Directed generation	09/01/2010	08/31/2012	Office of Naval Research	FED	Active

FAST Query: U_GM_FIND_MY_GFA

Descr: Find RFM Contacts for a Grant

About this query:

This query returns a list of Research Financial Management (RFM) contacts for all sponsored awards (contracts & grants). User is prompted for Contract Num / Project ID like (use the % wildcard for multiple projects).

Example:

Contract or F View Resu	ract or Project like: <u>[2107102100</u> ew Results wwnload results in : <u>Excel SpreadSheet</u> <u>CSV Text File</u> (1 kb)															
Download	l results in :	Excel Spread	ISheet CSV	/ Text File (1 kb)											
/iew All	w All															
Award / Contract Num	Award Title	Award PI	Sponsor	Award Begin Date	Award End Date	Status	Contract Admin	Transaction Setup Team	Trans Team Phone	Trans Team Email	Reporting Invoicing Team	Reporting Team Phone	Reporting Team Email	Closeout Team	Closeout Team Phone	Close
1 21071021	CAREER: Responsive, Surface Attached	Toomey,Ryan G	National Science	02/01/2007	01/31/2012	ACTIVE		Williams,Kevin	974- 3998	kevinw@admin.usf.edu	Davis,Cheryl A	974-6089	cadavis@admin.usf.edu	Gordon,Lew-	974- 4918	lagordc

Continued:

															1-1 of 1	🕞 Last
or	Award Begin Date	Award End Date	Status	Contract Admin	Transaction Setup Team	Trans Team Phone	Trans Team Email	Reporting Invoicing Team	Reporting Team Phone	Reporting Team Email	Closeout Team	Closeout Team Phone	Closeout Team Email	Team Status	Award Purpose	Funding Source
l tio	02/01/2007 1	01/31/2012	ACTIVE		Williams,Kevin	974- 3998	kevinw@admin.usf.edu	Davis,Cheryl A	974-6089	cadavis@admin.usf.edu	Gordon,Lew- Anne	974- 4918	lagordon@admin.usf.edu	Team Assigned	Research	Federal

FAST Query: U_GM_KK_ENDDT

Descr: Check the KK end date for Proj

About this query:

This query returns the budget definition information from commitment control for grant projects. Query shows the Ledger Group, Project ID, Budget Level, Control Option, Begin Date, and End Date. Search is based on a User prompt for a Project ID like (use the % wildcard for multiple projects).

Example:

Project ID like (use	%): 2107%
View Results	

Download results in : Excel SpreadSheet CSV Text File (38 kb)

View All						First 💽 1-10	00 of 150 🕞 <u>Last</u>
	Ledger Grp	Project ID	Budget Level	Control Option	KK Begin Date	KK End Date	Status
1	CC_GM_PAR	2107003900	LEVEL_1	Control	08/15/1986	01/31/1989	Inactive
2	CC_GM_CHD	2107003900	LEVEL_1	Track w/BD	08/15/1986	01/31/1989	Inactive
3	CC_GM_PAR	2107004700	LEVEL_1	Control	02/15/1989	01/31/1992	Inactive
4	CC_GM_CHD	2107004700	LEVEL_1	Track w/BD	02/15/1989	01/31/1992	Inactive
5	CC_GM_PAR	2107005000	LEVEL_2	Control	09/01/1989	08/31/1990	Inactive

FAST Query: U_GM_LIST_UNDERWRITES

Descr:

About this query:

This query lists initial and bridge underwrite information. The query displays, Type, PI Name, Project Title, Proposal ID, Version (specific to central admin), Status, Sponsor Name, Contract ID, and Begin & End Dates.

U_0	M_LIS	T_UNDERWRITES-	Initial and Bridge Underwrites								
D	unload	requite in the lea	101 1 001/7 151 (110 kb)								
D	wnioad	results in : Excel Sp	readSheet CSV Text File (148 KD)								
Viev	<u>r All</u>								First	◀ 1-100 of	282 🕟 <u>Last</u>
Viev	<u>r All</u> Type	Name	Title	Proposal	Version	Status	Customer	Name	First Contract	1-100 of Begin Date	282 💽 <u>Last</u> End Date
<u>Viev</u>	<u>(All</u> Type INITIAL	Name Armstrong,Mary I	Title Child Welfare Technical Assistance Implementation Center	Proposal 0900000109	Version V101	Status	Customer 61385	Name American Institutes for Research	First Contract 58301300	 1-100 of Begin Date 10/01/2008 	282 🕟 <u>Last</u> End Date 09/30/2009

FAST Query: U_GM_PAYMENTS_RECEIVED

Descr: Returns Payments rec'd on proj

About this query:

This query is used to identify payments received on a project. User is prompted for a Project ID.

Proj V	ect#: 2107102100													
Do	ownload results in	n : Excel Spread	Sheet CS	V Text Fi	le (9 kb)									
Viev	v All												First 利 1-26 of 2	6 🕞 Last
	Journal ID	Date	Period	Year	Source	Status	Oper Unit	Fund	DeptID	Project	Account	Amount	Line Descr	User
1	ARP0163765	10/24/2007	4	2008	AR	P	TPA	20000		2107102100	12100	-34346.980	AR Payments	batch
2	ARP0166371	11/19/2007	5	2008	AR	P	TPA	20000		2107102100	12100	-9319.200	AR Payments	batch

FAST Query: U_GM_RSCH_RIA_FUND_RSA

Descr: RSA- NEW RSH INITIATIVE AWARDS

About this query:

This query returns associated FAST chartfield information, Ledger Group, Year (Fiscal year), Initiative Name, Budget, Pre-Encumbrances, Encumbrances, Expense, and Commitment Control RSA.

The user is asked to provide the Fiscal Year, FAST DeptID (use the % wildcard for multiple departments), Fund (use the % wildcard for multiple fund codes), and the Initiative (use the % wildcard for all).

Example:

U_GM_RSCH_RIA_FUND_RSA - RSA- NEW RSH INITIATIVE AWARDS
Fiscal Year: 2012
DeptD like (use %, ex: 12%): 17%
Fund like, use % (e.g. 183%); 183% Q
Initiative = (use % for all): % Q
ViewResults
Download results in : Excel SpreadSheet CSV Text File (79 kb)

View All First 🕢 1-100 of 155 🕞 Last Unit Ledger Grp Year Oper Unit Fund DeptID Product Initiative Budget Pre-Encumbrances Encumbrances Expense Comm Cntrl RSA USF01 CC_DRG USF01 CC_DRG 2012 LKL 18322 173500 000000 0043299 Terry Paul 0.00 0.00 0.00 0.00 0.00 2012 TPA 18300 170100 000000 0034563 RI - PHYSICAL EDUC - STEWART 567.76 0.00 0.00 0.00 567.76 3 USF01 CC_DRG 2012 TPA College F&A Rebate 463307.11 0.00 387983.25 18300 170100 000000 COLLEGE 32421.94 42901.92

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 %).

epartment	like (use %): 21%													
View Res	ults													
Downloa	d results in : 🖻	cel SpreadSh	eet <u>CSV Text</u>	_{File} (7 kb)										
iew All												◀ 1-13 o	f 13 🕞 Last	
DeptiD	Name	Project	Ledger Grp	Excptn Type	Tran ID	Voucher	Awd End Date	Acctg Date	KK End Date	Recv Date	Invoice Date	Status	Gross Amt	
	Kumer Ashels	2105102044	OO ON OUD	No Budget Exists	0001997942	00557767	09/21/2011	02/17/2000	09/21/2000					
210500	Kumar,Ashok	2105105944	CC_GM_CHD	NO Duuget Exists	0001007042	00001101	00/3/12011	02/11/2008	00/3 1/2003		02/17/2009	Postable	0.000	

FAST Query: U_GM_VOUCHER_ACTIVITY

Descr: Voucher Activity for a Proj

About this query:

This query prompts for a date range of accounting dates and Project ID (use the % wildcard for multiple projects).

Acc Acc Proj V	tg Date F tg Date 1 ect ID Li <mark>ew Res</mark> i	rom: [p: 'o: 0' ke (add %): 2' ults	1/01/2007 1/01/2008 107%	ة ق]																	
Do <u>Viev</u>	ownload <u>/ All</u>	d results in	Excel Sp	readSheet	CSV Text File (+	409 kb)		nd D	antiD V	ender ID	Vandar Na			Inusiaa		Vchr	Freight	Misc	Merch	Tune	Vaushar
	Unit	Project	Accig Date	e Account	PRINTING/REPRO		FL	na De	epud V	endorid	vendor Na	me		invoice		Amount	Freight	Amt	Amount	туре	/oucner L
1	USF01	2107100600	01/01/200	7 61000	SERVICES		20	000 21	0700 00	00033363	BAZHANG Y	U	1030200	6BYU		85.970	0.000	0.000	85.970	Regular (0372163
2	USF01	2107100601	01/04/200	7 53600	SUPPLY/EQUIP L RESEARCH	AB &	20	000 12	1300 00	00046980	ROBERT GOSHERT/ SUNCOAST PIPETTE REPAIR		BG10170	6B		66.000	0.000	0.000	66.000 F	Regular (0382807
-			1					_											First ┥ 1	-100 of 43	2 🕟 Last
Ver	dor ID	Vendor Nan	ne	Inv	oice	Vchr Amount	Freight	Misc Amt	Merc Amou	h nt Type	Voucher	Line	Related Voucher	PO No.	ltem	Item	Descrip	ntion	Recv Date	Payme Sel Status	nt Post Status
0000	033363	BAZHANG YU	10302	006BYU		85.970	0.000	0.00	0 85.9	70 Regula	r 00372163	1				D103020	06EREII	ИВ		Paid	Posted
0000	046980	ROBERT GOSHERT/ SUNCOAST PIPETTE REPAIR	BG101	706B		66.000	0.000	0.00	0 66.0	00 Regula	r 00382807	1		0000099384		pipette ca	libration		12/18/200	6 Paid	Posted

FAST Query: U_GM_PRODUCTION_LIST

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).

υ_	GM_PR	опстю	N_LIS	T - List of	Award	Milestone	s																^
Co	ntract/Pro	ect (like use	ə %): 6 1	23108600																			
De	ot/College	(like use %):	96																				
Ca	npus (use	% for All):	96																				
	/lew Resu	Its																					
C	ownload w All	results in	Exci	el SpreadShe	et <u>CSV</u>	<u>/TextFile</u> (2	23 kb)																
	Award / Contract Number	Milestone Due Date	e Mile Type	Milestone Type Description	Mile Code	Milestone Code Description	Milestone Completed	Report / Invoice GFA	Report / Invoice GFA Email	Transaction / Setup GFA	Transaction / Setup GFA Email	Sponsor	Award Pl	Award Title	Reference Award Number	Commit Cntrl Parent Begin Date	Commit Cntrl Parent End Date	Award Begin Date	Award End Date	Milestone ID	Milestone Completion Date	Milestone Completed By	
1	6123108	5 04/30/201	0 BILL	Bill	GEN	Generic Sponsor Invoice	Y	Smith,David B	dsmith4@admin.usf.edu	Perez,Nancy	nperez@admin.usf.edu	Florida Department of Health	Mohapatra,Shyam S	Targeted Gene Therapy by SNAP Delivery Method	09BW-07	01/01/2010	12/31/2011	01/01/2010	12/31/2011	30	04/20/2010	Rios,Stephanie	
2	6123108	6 07/31/201	0 BILL	Bill	GEN	Generic Sponsor Invoice	Y	Smith,David B	dsmith4@admin.usf.edu	Perez,Nancy	nperez@admin.usf.edu	Florida Department of Health	Mohapatra,Shyam S	Targeted Gene Therapy by SNAP Delivery	09BW-07	01/01/2010	12/31/2011	01/01/2010	12/31/2011	40	07/28/2010	Minardo,Dena Mae	

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).

Example:

U_PCARD_CHGS_POSTED_PROJ - PCard charges posted by projec Project #: 6123108600

View Results

Download results in : Excel SpreadSheet CSV Text File (189 kb)

<u>Viev</u>	v All															First 🗃 1-	100 of 26	62 🕟 Last
	Merchant	Amount	Descript	Name	Tran Nbr	Trans Date	Approved By	Date	Voucher	Account	DeptID	Oper Unit	Fund	Project	PC Bus Unit	Activity ID	Product	Initiative
1	FISHER SCI ATL	50.560	Fisher lab supplies	Mohapatra,Shyam S	24164071286095131101766	10/13/2011	DMWASHING	11/02/2011	00755072	53600	610802	HSC	21000	6123108600	GRT01	BUDGET	000000	0000000
2	INVITROGEN*21245633	1433.290	Invitrogen lab supplies	Mohapatra,Shyam S	24692161285000586819228	10/12/2011	DMWASHING	11/02/2011	00755072	53600	610802	нѕс	21000	6123108600	GRT01	BUDGET	000000	0000000
3	APPLIED BIOSYSTEMS	1041.950	Vector lab supplies 916103694WTO9FTLTTHUM	Mohapatra,Shyam S	24492801285118000101305	10/12/2011	DMWASHING	11/02/2011	00755072	53600	610802	нзс	21000	6123108600	GRT01	BUDGET	000000	0000000

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%).

U_WORP	KFLOW_ROUTING - Req Approvers & Managers			
Enter %Ch	artfield%: 1725104100			
100110				
Downlo	ad results in : Excel SpreadSheet CSV Text File (1 kb)			
View All				First 🗨 1-4 of 4 🕞 Last
	Full Name	User ID	Role Name	Chartfield
1	Lisa M Lopez	LMLOPEZ	Req_Approver	1725104100
2	Robert Lugo	RLUGO	Req_Approver	1725104100
3	Lisa M Lopez	LMLOPEZ	Req_Manager	1725104100
4	Robert Lugo	RLUGO	Req_Manager	1725104100

FAST Query: U_YE_OPEN_POS_BY_DEPT

Descr: Open POs By Dept %

About this query:

This query, originally designed for year end processing, displays open Purchase Order information for a specific department.

The user is prompted for Oper U (Operating Unit) and Dept (FAST DeptID). Use the % wildcard for non-defined or partially-defined prompt values.

Example:

U_YE_OPEN_POS_BY_DEPT - Open POs By Dept %



Download results in : Excel SpreadSheet CSV Text File (64 kb)

	ew All																at [a] 1-58 Of	58 🕞 Last
	Name	PO Date	PO No.	PO Line #	Distribution Line	More Info	Original PO Amt	Encum Balance	Oper Unit	Fund	Account	DeptID	Product	Initiative	Project	Activity ID	Received Status	PO Match Status
1	H LEE MOFFITT CANCER CENTER	06/02/2009	0000144386	1	7	ITEM# FP2200100 5 PRIME MASTER MIX PCR MIN	127.960	127.960	нзс	20000	53600	612300	000000	0000000	6123106500	BUDGET	PO Not Received	To Match
2	PEPROTECH INC	06/19/2009	0000145030	1	7	ITEM# 300-07 SCF	195.000	195.000	HSC	20000	53600	612300	000000	0000000	6123107700	BUDGET	Fully Received	Matched

FAST Query: U_YE_OPEN_POS_BY_PROJECT

Descr: Open POs By Proj %

About this query:

This query, originally designed for year end processing, displays open Purchase Order information for a specific project. The user is prompted for Project (use the % wildcard for multiple projects).

U_YE_OPEN_POS_BY_PROJECT - Open POs By Proj %	
Project %: 6123%	
View Results	
Download results in : Excel SpreadSheet CSV Text File (44 kb)	
View All	First 🖪 1-40 of 40 🕞 Last

	Name	PO Date	PO No.	PO Line #	Distribution Line	More Info	Original PO Amt	Encum Balance	Oper Unit	Fund	Account	DeptID	Product	Initiative	Project	Activity ID	Received Status	PO Match Status
1	H LEE MOFFITT CANCER CENTER	06/02/2009	0000144386	1	7	ITEM# FP2200100 5 PRIME MASTER MIX PCR MIN	127.960	127.960	нѕс	20000	53600	612300	000000	0000000	6123106500	BUDGET	PO Not Received	To Match
2	PEPROTECH INC	06/19/2009	0000145030	1	7	ITEM# 300-07 SCF	195.000	195.000	HSC	20000	53600	612300	000000	0000000	6123107700	BUDGET	Fully Received	Matched

GEMS Department Summary Report: The Department Summary Report provides a detailed view of how Department, Position and Appointment level pay distribution is setup within a department.

GEMS Navigation: (Main Menu > USF Menu Items > Report > Department Summary Report).

Step 1 Enter your **Run Control ID** and click the **Search** button.

ORACLE
Favorites Main Menu > USF Menu Items > USF Menu Items > Report > Department Summary Report
Department Summary Report
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value Add a New Value
Limit the number of results to (up to 300): 300
Search by: Run Control ID begins with rlj
Case Sensitive
Search Advanced Search

Find an Existing Value Add a New Value

Note: To add a Run Control ID, click the Add a New Value tab. Type in your Run Control ID in the edit box (a Run Control ID may be up to 30 characters long with no spaces). Click the Add button.

Step 2 Enter the GEMS 10 character Dept ID in the **Department** box and leave the **As of Date** blank for current distribution. Click the **Run** button.



Step 3 The Process Scheduler Request page appears. The Process List reflects the requested report. Notice the Process Name, U_PAYS1. Ensure that the Server Name = PSNT, Type = Web and Format = PDF. Click the OK button.

ORACLE					
Favorites Mair Menu > USF Menu Items > US	F Menu Items 👌 Re	ort > Department 9	Summary Report		
Process Scheduler Request					
Jser ID: RJONES		Run Control ID:	: rlj		
Server Name: PSNT	Run Date: 11 Run Time: 5:0	/09/2011 関	Reset to Current I	Date/Time	
Tme Zone:					
Select Description	Process Name	Process Type	<u>*Түре</u> <u>*F</u>	ormat Distribution	
 Department Summary Rpt 	U_PAYS1	SQR Report	Web 😽 P	PDF 🛛 🖌 Distribution	
OK Cancel					_

Step 4 Once you've clicked OK on the Process Scheduler Request page, you'll return to the Process Request Dialog page. Notice the Process Instance number. Click the **<u>Report Manager</u>** hyperlink.

ORACLE			
Favorites Main Menu > USF Menu Items > USF Menu Ite	ems > Report >	Department Summary Report	
U Runcntl U Pays1	/		
Run Control ID: rlj	Report Manager	Process Monitor Run Process Instance:542089	
Report Request Parameters			
Department: 0-1725-000 As of Date: *Leave blank for current di	istribution	(Only Valid On Current Distribution)	
Save Return to Search + Previous in List	Next in List	Notify	Add Update/Display

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

ORACLE	ORACLE								
avorites Main Menu > USF Menu Items > USF Menu Items > Report > Department Summary Report									
List Explorer	List Explorer Administration Archives								
View Reports For	View Reports For								
Folder:	Folder: v Instance: to: Refresh								
Name:	Name: Created On: 🛐 Last 🗸 1 Days 🗸								
Reports Customize Find View All T First K 1 of 1 D Last									
Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance				
1 U PAYS1	DEPARTMENT SUMMARY RPT	General	11/09/11 5:08PM	472679	542089				

Go back to Department Summary Report

Step 6 The Report Manager, Administration page displays the requested report's status. Once the report is finished, the Status will change to **Posted** and the Description (report name) becomes a live link to the report. Click the Department Summary Report hyperlink to view the report.

ORAC	ILE'										
Favorites Ma	ain Menu > USF	Menu Ite	ms > USF Menu	Items > F	Report > De	partment 9	Summary Re	eport			
Liet Evo	lorer Admin	istration	Archivee								
LIST EXP	Iorer Admin	ISUAUUII	Archives	-			_				
View Repo	rts For										
User ID:	RJONES	Тур	e:	~	Last	~	5	5	Days	~	Refresh
Status:		Y Fol	der:	~	Instance:		to:				
Report List	t			<u>Sustomize</u>	Find View All	1 🖉 🛄	First 🚺 1 of	f 1 🖸 La	st		
Select	Report ID	Prcs Instance	Description		Request Date/Time	Format	Status	<u>Details</u>			
	472679	542089	Department Sum	mary Rpt	11/09/2011 5:08:03PM	Acrobat (*.pdf)	Posted	Details			
							\smile				

Select All Deselect All Click the delete button to delete the selected report(s) Go back to Department Summary Report Save List | Explorer | Administration | Archives

Note: Before a report can be read (Posted) it travels through several different stages; to view the Status of a report, click the yellow **Refresh** button. The status "N/A" indicates the process has just been added to the report request but processing has not yet started, there is nothing to post.

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

Report ID: U_PAYS1					DEPARTMEN	GEMS T PAY DISTRUBU	JTION SUMMAR	Y			Page No. 1 Run Date 11/09/2011 Run Time 17:08:20
					For Department (Cu)-1725-000 Psyc urrent Distrubu	tion	ndation			
Pay Dist Lvl Name Acct CD Pa D 000013560 1	y Dist%	Dept 172500	Ei S Account 50040	S. mpl Adi tat P Op Unit TPA	al min lan Position# Fund 10000	Emplid Project	RCD# Product 000000	Jobcode Initiatve 0000000	FTE Comprate SRN 172500000	Dept Budget Effdt Status 08/19/2011 A	FY 2012
P 000069931 6	6	172500	50022	TPA	00000252 20000	1725100300	000000	0000000	1.00 1725102L0	07/01/2011 A	2012

USF Finance Mart: The Finance Mart is USF's official reporting tool for financial reconciliations.

Direct access to Finance Mart, official USF ledgers, click: <u>https://eusf.admin.usf.edu/Topics/Applications/Queryland/Pages/default.aspx</u> (or go through <u>eUSF Portal</u>). Finance Mart system related questions? Contact Mark Devore (813/974-2286).

RSA Summary Output Search Criteria [Help Guide]					
 Enter Parameters 					
○ Select Parameters					
○ Select Multiple Parameters (Management Reports) <i>New</i>	Enter the Project ID.				
Select report type	Do not enter dashes in the				
Report Type: = V RSA Summary V	Project field.				
Enter one or more chartfields					
Operating Unit: = 🗸					
Department: = V					
Fund: = V	Check both boxes:				
Product: = V	✓ Check to Include Starting Balance				
Initiative: = ¥	 Check to enable period selection 				
Project: = V 6123108600					
Select reporting period					
Check to Include Starting Balance	Select the most recent				
Check to enable period selection	"closed" month from both				
Eiscal Period	the Fiscal Period Start and				
End 2009-2010 V 8- February V	End date boxes.				
Select Other Options					
Sort By: = V Chartfield V					
Check to save the Report Parameters					
Reset View Report					

Note: To receive UCO email notifications of official month close, click to subscribe to the FAST-LIST serv.

Direct access to Finance Mart, official USF ledgers, click:

<u>https://eusf.admin.usf.edu/Topics/Applications/Queryland/Pages/default.aspx</u> (or go through <u>eUSF Portal</u>). Finance Mart system related questions? Contact Mark Devore (813/974-2286).

Note: For projects with cost share, the Fund code may be entered for a differentiated view. Entering only the Project ID, will return both project and cost share information. Entering Project and Fund will limit the results to return only project information associated with the specified fund code.

When reviewing award setup, it is recommended to run the RSA Summary report by Project only to ensure that information has been properly distributed across funds codes, as applicable.

For monthly reconciliation, be sure to check both the "Check to Include Starting Balance" and the "Check to enable period selection" boxes. Select the most recent "closed" month, as indicated in the UCO email notification, from both the Fiscal Period Start and End date drop down boxes.

Research Reports:

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