

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](mailto: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.

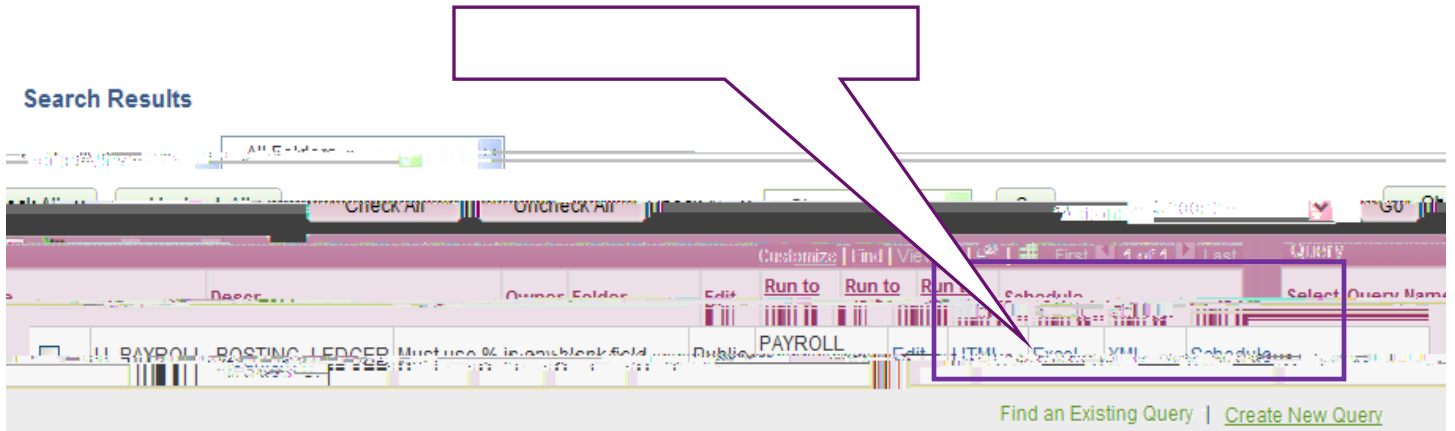
Search Results are displayed with various "run" options. Click the link **on the row of the query** for the desired run option:

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

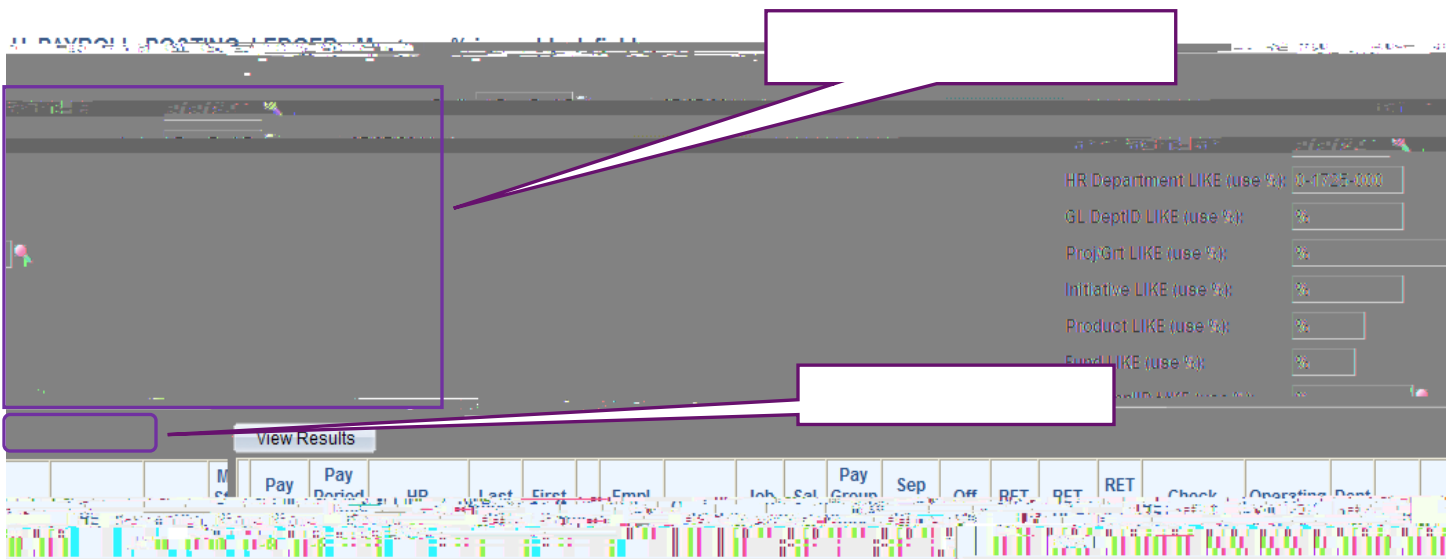
**Excel:** Click to download the query to a Microsoft Excel spreadsheet.

**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.

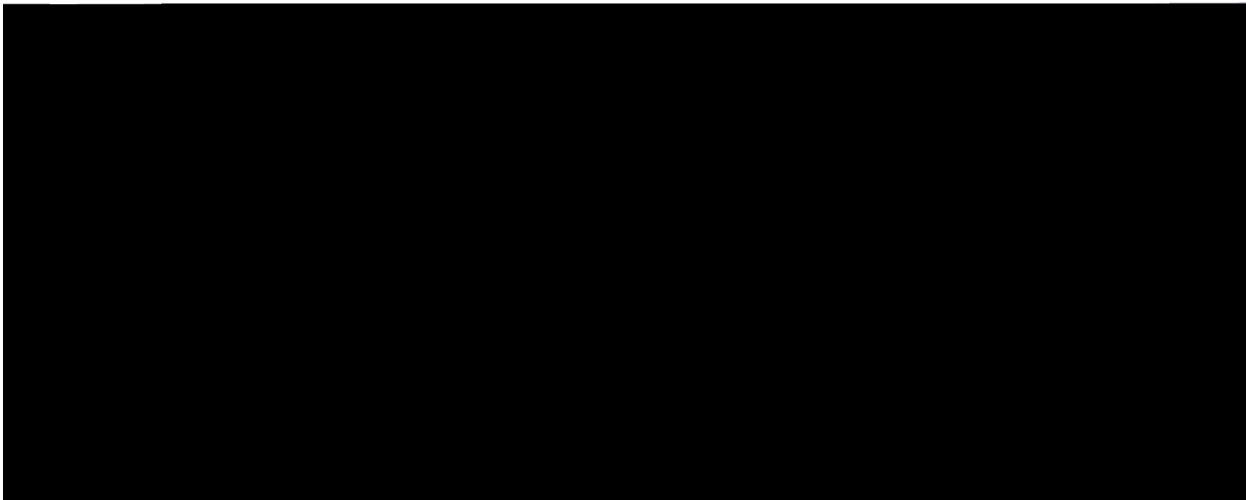


## Look up combo cds by CFVs

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.

Must use % in any blank field

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.



Continued:

ID	First Name	Last Name	Empl Record	HR Department	Position	Job Code	CA GL Dept	Pay Period	Reversed	Year	Period	Combo Code	Operating Unit	Fund	Act	Dist 1	Product	Chartfield1	Project	Bud Ent	Fund Id	Main Rpt Num	U Dist Source	U Dist Code1	U Dist Code2	U Dist Code3	U Dist Code4	U Dist Code5	Amount	Dist Sequence	Dist Status	Pay End Date	Pact Distrib	Sal Plan
658119	Anna	Da Silva	2-9-1725-000		9199	Y	1281	N		2011	12	000180576	TPA	20000	50040	172500	000000	00000000	1725104100	48900700	893038	1725124LD	ERRA	REG					0.0		54	00		
658119	Anna	Da Silva	2-9-1725-000		9199	Y																												

Must use % in any blank field

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.

U\_PAYROLL\_POSTING\_ABRIDGED - Must use % in any blank field

Line	EmpID	DeptID	EmpName	First Name	Last Name	EmpID	EmpName	DeptID	DeptName	Proj/Grt	Initiative	Product	Fund	Rate	Hours	Amount	Other	Total			
15	TPA	172500	1	1201	07/07/2011	Arango	Liza	00000071955	1	9182	05	0.500000	20000	000000	00000000	1725104100	100	793.046154	793.05	0.00	793.05





## Pay Dist Info w/ prompts

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.

11 PAY DISTRIBUTION DETAILS - Pay Dist Info w/ prompts

From Date: 08/01/2011 To Date: 08/31/2011

DeptID Like (%-All): %

Prod Like (%-All): %

Initiative Like (%-All): %

Proj/Grt Like (%-All): %

Position # Like (%-All): %

Emplid Like (%-All): %

Run Empl Rcd# (Use 0 for All): %

Empl Rcd#(Use 999 for All): 999

Dept Like (%-All): %

Download results in: 08/01/2011 10:00:14

Fund Code	Dept No	Product	Project/Grant	Position #	Emp ID	Dept ID	Product	Project/Grant	Position #	From Date	To Date	Empl Record #	Empl Record #	Position	Dept	Product	Project/Grant	Position #	Empl Record #
00	000000	00000000				1	0-1725-000	2012	Adair, Andrea Leigh-Lesley	00000084212	1	A	A	08/07/2011	000102425	100.000	TPA	10000	1725
	00000085329			1	A	A	08/05/2011	000102426	92.000	TPA	10000	172500	000000	00000000	3	0-1725-000	2012	Adams, Carolyn D	
	00000085329			1	A	A	08/05/2011	000102429	8.000	TPA	13000	172500	000000	00000000	4	0-1725-000	2012	Adams, Carolyn D	
	00000085329			1	A	A	08/19/2011	000102426	100.000	TPA	10000	172500	000000	00000000	5	0-1725-000	2012	Adams, Carolyn D	

## 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).

The screenshot shows a web application interface with a table of certifier information. The table has columns for Certifier ID, Name, and other details. One row is visible with Certifier ID 0-1213-000-00000040486 and Name Patel,Rakha S.

Dept ID	Certifier ID	Name	Other Info
0-1213-000	00000040486	Patel,Rakha S	5.00 12222010 05062011 2011.00000017559

## 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	Award	Award End	Direct	Indirect	PI	Sponsor	Award Begin Date	Award End Date	Costs						
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	0.00	0.00	0.00	CHEMICAL	09/15/1998	01/31/1999	0.00	0.00	0.00	National Science	15199.00	0000.00	15199.00
0.00	0.00	0.00	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,

FAST PROPERTY LIST - FAST Dept ID

DeptID: 211700

Download results (44185)

First 10 of 22 last

TPA	FAST	Manu	Descr	Serial #	Location
TPA 211700 18300 000000 DEPTMNT	495000254900	DELL	SERVER	91YROF1	CUT0208
TPA 211700 18370 000000 00000000	495000264002	DELL	LAPTOP COMPUTER	J62H9K1	CUT0242
TPA 211700 18370 000000 ENGCT02	495000266193	HEWLETT PACKARD	LASERJET PRINTER	JPCRB1W01W	CUT0244
TPA 211700 20000 000000 00000000	495000237117	DELL	SERVER	JZL0931	CUT0208





## 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,





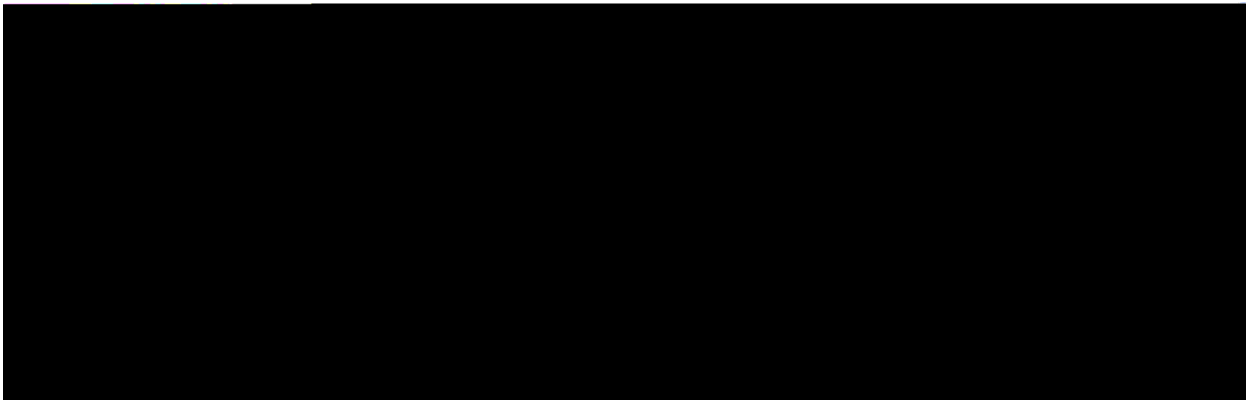




Voucher Activity for a Proj

## 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).



## PCard charges posted by projec

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

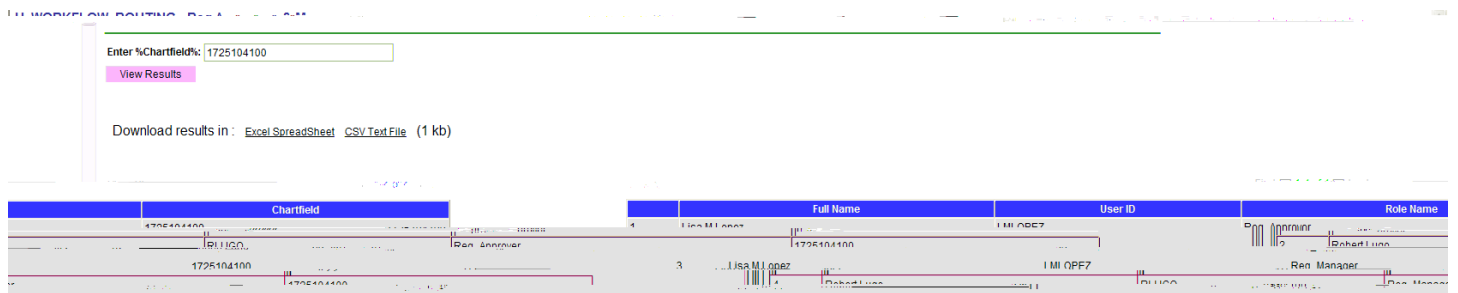


The screenshot shows a web application interface for searching PCard charges. At the top, there is a search bar with the text "Project #:" and a search icon. Below the search bar is a "View Results" button. Underneath, there are links for "Download results in:" followed by "Excel Spreadsheet" and "CSV Text File (189 kb)". A "View All" link is also present. The main area of the screenshot is a table with a grid of data. The table has a header row with various columns, and several rows of data below it. The data is somewhat obscured by a dark overlay, but some text is visible, such as "Vendor: ...", "Amount: ...", and "Date: ...".

Vendor	Amount	Date	Chartfield	...
...	...	...	...	...
...	...	...	...	...
...	...	...	...	...

## 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	Robert Luna	IM00P7	Req Manager
1725104100	Lisa Lopez	IM00P7	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



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