PEOPLESOFOR QUERIES
AWARD ADMINISTRATION

OSP Brief
2/7/2017
Query vs. Report

• A Query is a question that you pose to the system, based upon the parameters you enter. The query results can be downloaded into different formats (HTML, Excel, XML).

• A Report is a formatted result of a query. It provides only the information you want to see from the query.
How to run Queries
• Log into PeopleSoft using the two-step verification process.
• Once signed in, your open page may look like this

• Click on Reporting Tools
• Click on Query Viewer

• The Grants Community has access to all of the queries under the Folder BC GRANTS.

• To find all the queries with the BC GRANTS folder name click on the Advanced Search hyperlink.
• Folder Name option - type in BC GRANTS then click Search.
The Search Results screen shows the queries returned. At the far right, the number of rows are given. If all the rows are not shown, click the arrows next to First and/or Last to scroll through the pages.

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
<th>Owner</th>
<th>Folder</th>
<th>Run to HTML</th>
<th>Run to Excel</th>
<th>Run to XML</th>
<th>Schedule</th>
<th>Add to Favorites</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC_GM_BAL_SUM_BY_PI</td>
<td>Award balance-employee prompt</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_BUD_ACCTD_GRANTS</td>
<td>Proj AC info-Charstrtng prompt</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
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<tr>
<td>BC_GM_FIND_CONTRACT_BY_PROJECT</td>
<td>Find Contract--from Proj ID</td>
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<tr>
<td>BC_GM_FIND_PROJECT_BY_PROJECT</td>
<td>Find project # by contract #</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_GL_DEPT_DIRECT_P</td>
<td>Direct Exp-Period &amp; FY Prompts</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
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<td>BC_GM_GL_DEPT_INDIRECT_P</td>
<td>Indir Exp-Period &amp; FY Prompts</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_GL_DEPT_TOTAL_P</td>
<td>Total Exp - Period &amp; FY Prompts</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_GRANTS_ACTIVE</td>
<td>Grants w/proj status O, A, R</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_GRANTS_ACTIVE_BY_DEPT</td>
<td>Dept Prompt</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_GRANTS_ACTIVE_PI_LIST</td>
<td>Proj stat O.A</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_GRANTS_ALL_BY_DEPT</td>
<td>All Awards in PS by Dept prompt</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_PROGRESS_REPORT_DUE</td>
<td>PRG Milestones,mo fut,notcomOAR</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_PROJ_ACCT_SUMMARY</td>
<td>Bus. Unit &amp; Proj Prompt</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_PROPOSAL_SUBMIT_BY_DEPT</td>
<td>Submit Status by Dept</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Favorite</td>
</tr>
<tr>
<td>BC_GM_YEARLY_AWARD_TBL</td>
<td>Projected Yearly award</td>
<td>Public</td>
<td>BC GRANTS</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
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</table>
Another way to search is by Query Name.
Type query name in the box beside “begins with.”
Or use the wildcard (% sign) and a portion of the name, then click the search button.
• Hint: Save queries most often used under My Favorite Queries.
• To do this highlight the query row and click the Favorite hyperlink under the column Add to Favorites.

To delete a query from your Favorites, click the button in the Remove column.
• To run a query to Excel, click on the Excel hyperlink, then open or save the Excel file.
Types of Available Queries

- Financial
- Status
- Project Info.
- Department
- PI
Timing: GL vs. Proj. Resources

- The timing differences are primarily caused by feeder systems, such as Accounts Payable (vouchers and expense reimbursements).

- Example:
  - November transaction entered into Accounts Payable
  - But was not paid until December
  - So for November, the transaction would be in Proj. Resources, but not yet in the GL.
Queries to Assist in Admin. of Sponsored Projects

• **BC_GM_BAL_SUM_BY_PI**
  • Provides a list of sponsored projects for a Principal Investigator.
Queries to Aid Administration of Awards

- **BC_GM_BUD_ACCTD_GRANTS**
  - Provides a high level view of the project, which includes all of the account codes and the funding in those account codes.
Queries to Aid Administration of Awards

• **BC_GM_FIND_CONTRACT_BY_PROJECT**
  • This would inform you if there was a contract number issued for this sponsored project.

```
BC_GM_FIND_CONTRACT_BY_PROJECT - Find Contract--from Proj ID

Enter Project ID: 

View Results

<table>
<thead>
<tr>
<th>Grant</th>
<th>Project/Grant</th>
<th>Title</th>
<th>PI</th>
<th>Department</th>
<th>Sponsor</th>
<th>Type</th>
<th>Budget Period Begin</th>
<th>Budget Period Begin</th>
<th>Status</th>
</tr>
</thead>
</table>
```

• **BC_GM_FIND_PROJECT_BY_CONTRACT**
  • This would inform you if there was a project number issued under this contract/award.

```
BC_GM_FIND_PROJECT_BY_CONTRACT - Find project #s by contract #

Contract: 

View Results

<table>
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<th>Title</th>
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<th>Budget Period Begin</th>
<th>Budget Period End</th>
<th>Status</th>
</tr>
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</table>
Queries to Aid Administration of Awards

• **BC_GM_GRANTS_ACTIVE**
  • Provides a list of all sponsored projects in your department (Status: Open, Accounting Only, or Reporting Only).

• **BC_GM_GRANTS_ALL_BY_DEPT**
  • All Grants since PeopleSoft implementation (Dept ID prompt).

• **BC_GM_GRANTS_ACTIVE_PI_LIST**
  • Provides a list of PI’s in your department with sponsored projects (Status: Open and Accounting Only).
Queries to Aid Administration of Awards

- **BC_GM_PROJ_ACCT_SUMMARY**
  - Provides a high level view of the accounts, including parent accounts, and the amounts remaining in those account codes.
Forecasting Queries at the Dept. Level

- **BC_GM_GL_DEPT_DIRECT_P**
  - Lists Actual direct costs of sponsored projects by department.

- **BC_GM_GL_DEPT_INDIRECT_P**
  - Lists Actual F&A (indirect costs) by department.

- **BC_GM_GL_DEPT_TOTAL_P**
  - Lists all actual costs of sponsored projects by department.
Forecasting Queries at the Dept. Level

- **BC_GM_GRANTS_ACTIVE_BY_DEPT**
  - Provides list of all active sponsored projects under a Dept. ID.

Click on magnifying glass `🔍` to search if unsure of Dept ID:
Another Query

- **BC_GM_PROPOSAL_SUBMIT_BY_DEPT**
  - Provides a list of approved Proposal Transmittal Forms.
REPORTS

Financial Management

• [http://www.bc.edu/research/osp/assistdoc.html](http://www.bc.edu/research/osp/assistdoc.html)

• Provides instructions for running GBAS, ACR, TDR.

• Grant Balance Summary Report (GBAS)
  • Report provides real-time financial data on a project.
  • Data is pulled from Project Resources.
REPORTS
Financial Management

• Budget/Accounted Comparison Report for Grants (ACR)
  • Provides budgeted and expended summary data (by account) with month ending balance available.
  • Presents a comparison of budgeted and accounted data.
  • Data is pulled from the General Ledger (GL).

• Transaction Detail Report for Grants (TDR)
  • Report provides detail activity; contains individual transactions.
    • budget transfers, requisitions, purchase orders, vouchers, expense reports, salary encumbrances, salary actuals, and journal entries for standard charges (P-Card, Pitney Bowes, BOC) and allocations (Fringe Benefits, Plant Maintenance, F&A).
  • Data is pulled from the General Ledger (GL).
  • Transactions sort in ascending date order.
QUESTIONS?
KEEP CALM AND QUERY ON