

PEOPLESOFT QUERIES AWARD ADMINISTRATION

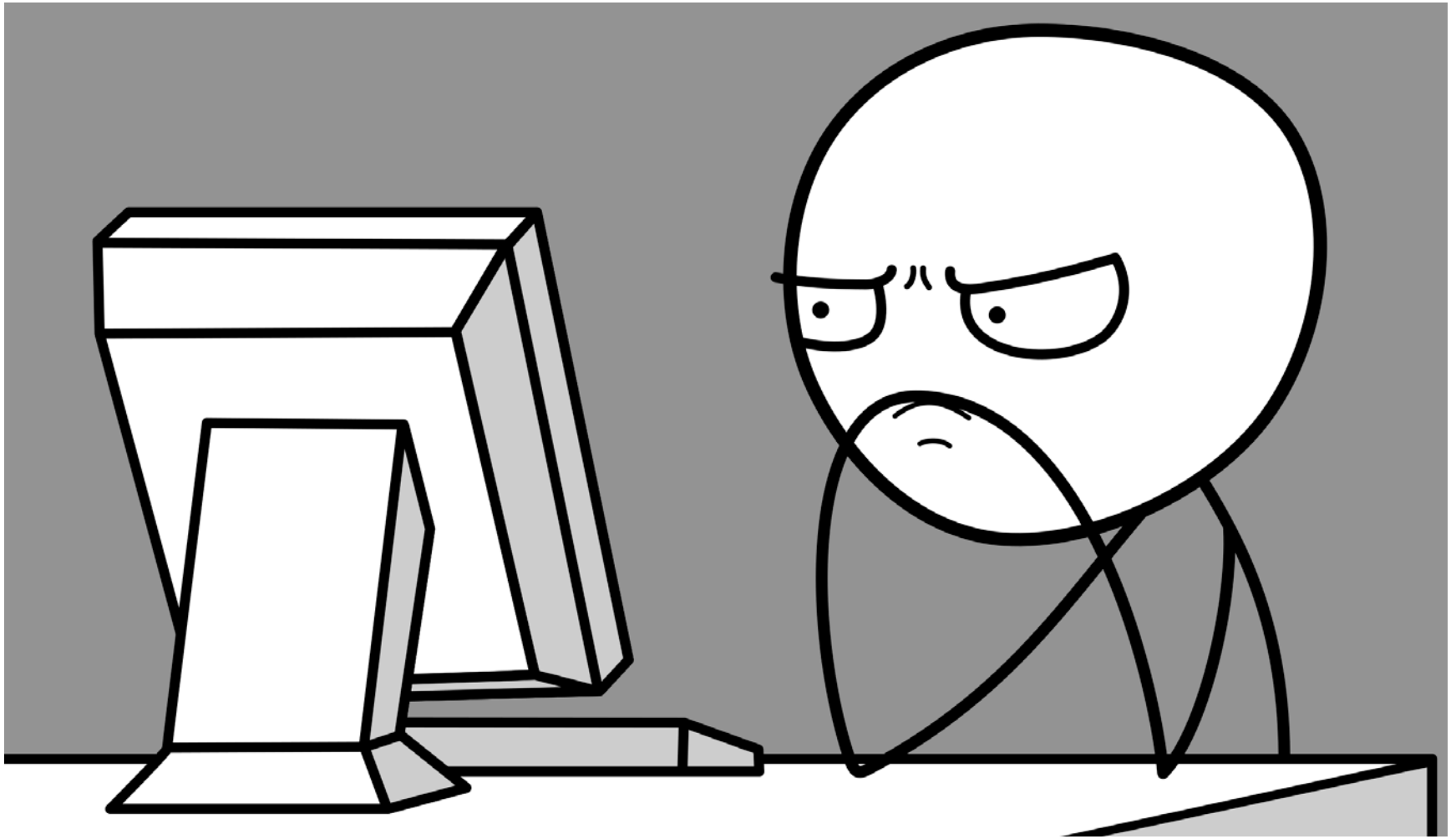
OSP Brief

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.

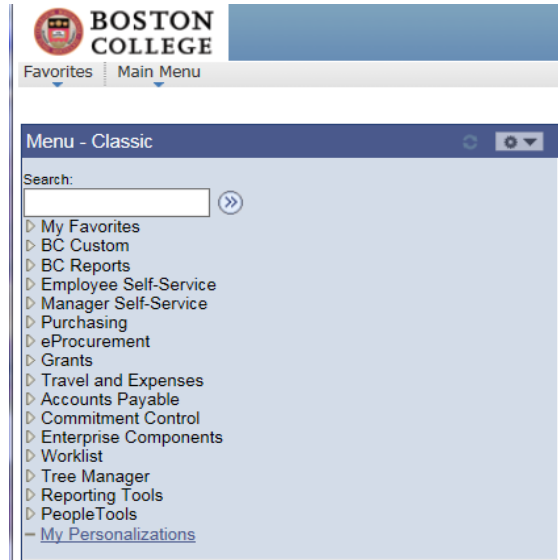
The screenshot shows a web browser window with the URL <https://login.bc.edu/nidp/idff/sso?id=DUOA>. The page features a dark red header with the text "BOSTON COLLEGE" in white. Below the header is a white sign-in form. The form contains the following elements:

- A heading: "Sign in to continue"
- A text input field labeled "Username"
- A text input field labeled "Password"
- A link: [Forgot your password?](#)
- A red button labeled "Sign in"
- A section titled "Important Security Updates:" with the following text:

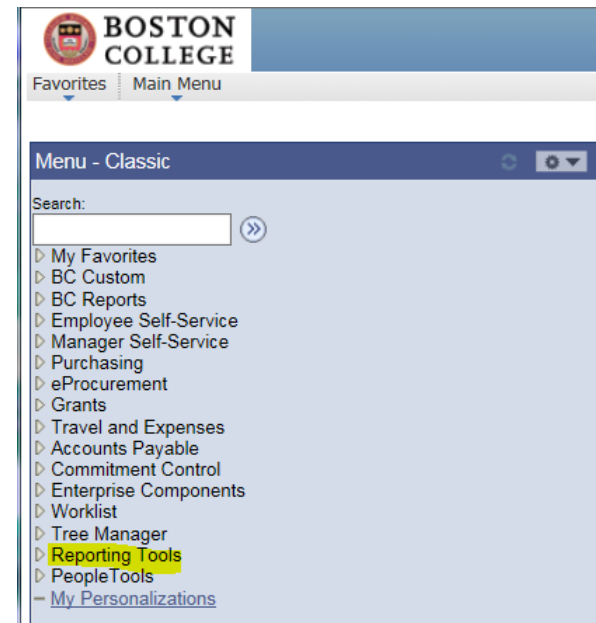
As of 10/15/16, all open Portal services will log out after 2 hours of inactivity.

When you log out of one Portal service, other open services will also be closed.
- A section titled "Need help?" with the text: "Call the Help Center at 617-552-HELP (4357)."
- A paragraph of disclaimer text: "Access to the Boston College technological and information resources is a privilege available only to authorized individuals. This privilege requires that all users be responsible for the protection of University resources and that all use be in accordance with the [Boston College Technology Use Agreement](#)"

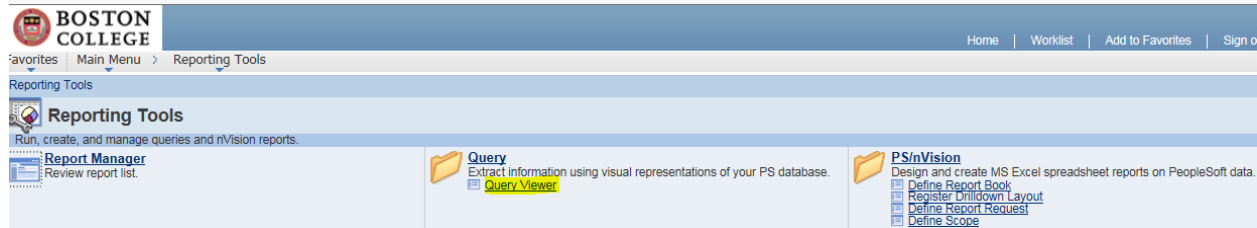
- Once signed in, your open page may look like this



- Click on Reporting Tools



- Click on Query Viewer

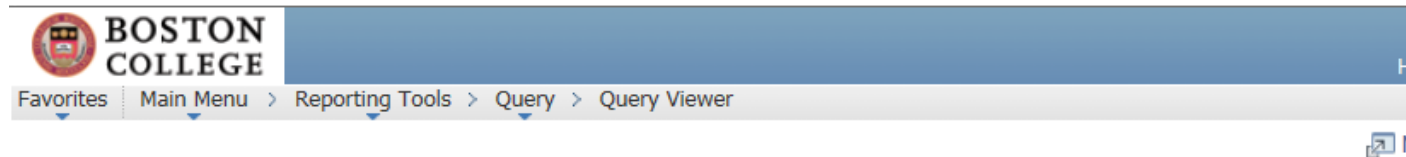


- The Grants Community has access to all of the queries under the Folder BC GRANTS.
- To find all the queries with the BC GRANTS folder name click on the Advanced Search hyperlink.

The screenshot shows the 'Query Viewer' search interface. The search criteria are set to 'Query Name' and 'begins with'. The 'Advanced Search' link is highlighted. Below the search area is a table titled 'My Favorite Queries' listing several queries with columns for Name, Description, Owner, Folder, and various action links.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Remove
BC_GM_GL_DIRECT_PROJ_ID_PI	Direct Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	-
BC_GM_GL_INDIRECT_PROJ_ID_PI	Indir Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	-
BC_GM_GRANTS_ACTIVE	Grants w/ proj status O, A, R	Public	BC GRANTS	HTML	Excel	XML	Schedule	-
BC_GM_PROPOSAL_SUBMIT_BY_DEPT	Submit Status by Dept	Public	BC GRANTS	HTML	Excel	XML	Schedule	-

- Folder Name option - type in BC GRANTS then click Search.



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name	begins with	<input type="text"/>
Description	begins with	<input type="text"/>
Uses Record Name	begins with	<input type="text"/>
Uses Field Name	begins with	<input type="text"/>
Access Group Name	begins with	<input type="text"/>
Folder Name	begins with	<input type="text" value="BC GRANTS"/>
Owner	=	<input type="text"/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic 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.

Access Group Name

Folder Name

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

Search Results

*Folder View

Query	Personalize Find View All 1-15 of 15 First Last							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
BC_GM_BAL_SUM_BY_PI	Award balance-employee prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_BUD_ACCTD_GRANTS	Proj AC info-Chartstrng prmpt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_FIND_CONTRACT_BY_PROJECT	Find Contract--from Proj ID	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_FIND_PROJECT_BY_CONTRACT	Find project #s by contract #	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_DIRECT_P	Direct Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_INDIRECT_P	Indir Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_TOTAL_P	Total Exp - Period & FY Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE	Grants w/ proj status O, A, R	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_BY_DEPT	Dept Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_PI_LIST	Proj. stat O,A	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ALL_BY_DEPT	All Awards in PS by Dept prmpt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_PROGRESS_REPORT_DUE	PRG Milestn, 2 mo fut, notcomOAR	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_PROJ_ACCT_SUMMARY	Bus. Unit & Proj Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_PROPOSAL_SUBMIT_BY_DEPT	Submit Status by Dept	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_YEARLY_AWARD_TBL	Projected Yearly award	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite

- 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.

BOSTON COLLEGE Home

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

New V

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
BC_GM_GRANTS_ACTIVE	Grants w/ proj status O, A, R	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_BY_DEPT	Dept Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_FORECAST	End dt Hardcode_OARG -prj stat	Public		HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_PI_LIST	Proj. stat O,A	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ALL_BY_DEPT	All Awards in PS by Dept prmpt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite

BOSTON COLLEGE Home

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

New V

Query Viewer

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*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

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BC_GM_GL_DEPT_DIRECT_P	Direct Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_INDIRECT_P	Indir Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_TOTAL_P	Total Exp - Period & FY Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite

- **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.

BOSTON COLLEGE Home | Work

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

New Window

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites	
BC_GM_GL_DEPT_DIRECT_P	Direct Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite	
BC_GM_GL_DEPT_INDIRECT_P	Indir Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite	
BC_GM_GL_DEPT_TOTAL_P	Total Exp - Period & FY Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite	

My Favorite Queries									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to HTML	Schedule	Remove	
BC_GM_GRANTS_ACTIVE	Grants w/ proj status O, A, R	Public	BC GRANTS	HTML	Excel	XML	Schedule	<input type="button" value="-"/>	
BC_GM_PROGRESS_REPORT_DUE	PRG Milestn,2 mo fut,notcomOAR	Public	BC GRANTS	HTML	Excel	XML	Schedule	<input type="button" value="-"/>	
BC_GM_PROPOSAL_SUBMIT_BY_DEPT	Submit Status by Dept	Public	BC GRANTS	HTML	Excel	XML	Schedule	<input type="button" value="-"/>	

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.

Access Group Name

Folder Name

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
BC_GM_BAL_SUM_BY_PI	Award balance-employee prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_BUD_ACCTD_GRANTS	Proj AC info-Chartstrng prmpt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_FIND_CONTRACT_BY_PROJECT	Find Contract--from Proj ID	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_FIND_PROJECT_BY_CONTRACT	Find project #s by contract #	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_DIRECT_P	Direct Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DEPT_INDIRECT_P	Indir Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_DIRECT_PROJ_ID_PI	Direct Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GL_INDIRECT_PROJ_ID_PI	Indir Exp-Period & FY Prompts	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE	Grants w/ proj status O, A, R	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_BY_DEPT	Dept Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ACTIVE_PI_LIST	Proj. stat O,A	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_GRANTS_ALL_BY_DEPT	All Awards in PS by Dept prmpt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_PROGRESS_REPORT_DUE	PRG Milestn,2 mo fut,notcomOAR	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_PROJ_ACCT_SUMMARY	Bus. Unit & Proj Prompt	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_PROPOSAL_SUBMIT_BY_DEPT	Submit Status by Dept	Public	BC GRANTS	HTML	Excel	XML	Schedule	Favorite
BC_GM_YEARL								

Do you want to open or save BC_GM_GRANTS_ACTIVE_16838.xls from psfnawt.bc.edu?

Types of Available Queries

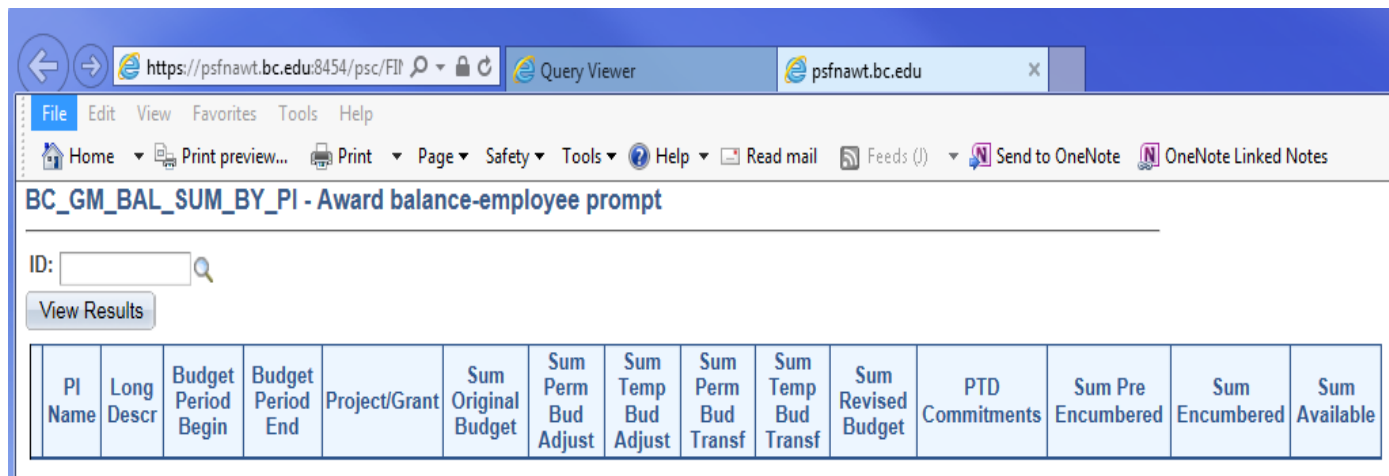
- Financial
- Status
- Project Info.
- Department
- PI

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.



The screenshot displays a web browser window with the URL <https://psfnawt.bc.edu:8454/psc/FILE> and the page title "BC_GM_BAL_SUM_BY_PI - Award balance-employee prompt". Below the title is an "ID:" search field with a magnifying glass icon and a "View Results" button. A table is visible below the search area, with the following columns:

PI Name	Long Descr	Budget Period Begin	Budget Period End	Project/Grant	Sum Original Budget	Sum Perm Bud Adjust	Sum Temp Bud Adjust	Sum Perm Bud Transf	Sum Temp Bud Transf	Sum Revised Budget	PTD Commitments	Sum Pre Encumbered	Sum Encumbered	Sum Available
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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.

BC_GM_BUD_ACCTD_GRANTS - Proj AC info-Chartstrng prmpt

Department:

Fund Code:

Fund Source:

Program Code:

Function:

Property:

Account:

Project/Grant:

[View Results](#)

Unit	Dept	Descr	Project/Grant	Parent Node	Account	Descr	Function	Original Budget	TEMP_REV	PERM	Revised Budget	Actual	Pre Encumbered	Encumbered	Available
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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:

Grant	Project/Grant	Title	PI	Department	Sponsor	Type	Budget Period Begin	Budget Period End	Status
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- 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:

Grant	Project	Title	PI	Department	Sponsor	Type	Budget Period Begin	Budget Period End	Status
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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.

BC_GM_PROJ_ACCT_SUMMARY - Bus. Unit & Proj Prompt

Business Unit: 

Project/Grant: 

[View Results](#)

Business Unit	Project Type	Fund	Project/Grant	Project Name	Current Status	Status Effective Date	Principal Investigator	Name	Contract	Sponsor Id	Sponsor Name	Account	Account Description	Budget	Encumbrances	Actuals	Balance Available
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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.

BC_GM_GL_DEPT_TOTAL_P - Total Exp - Period & FY Prompt

From Per:

To Per:


Year:

	Dept	Descr	Total Amt
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Forecasting Queries at the Dept. Level

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


BC_GM_GRANTS_ACTIVE_BY_DEPT - Dept Prompt

Dept: 

Grant	Project	Title	PI	Ref Awd #	Department	Sponsor	Type	Award Begin Date	Award End Date	Status	Budget Period Begin	Budget Period End	Sum BU Amount
-------	---------	-------	----	-----------	------------	---------	------	------------------	----------------	--------	---------------------	-------------------	---------------

Click on magnifying glass  to search if unsure of Dept ID:

BC_GM_GRANTS_ACTIVE_BY_DEPT - Dept Prompt

Dept: 

Grant	Project	Title	PI	Ref Awd #	Department	Sponsor
-------	---------	-------	----	-----------	------------	---------

Search by: Department begins with

[Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed.


[View 100](#) First 1-300 of 300 Last


Department	Description
000000	No Department
010000	All Departments
010001	Presidents Office
010002	President General Administrati
010021	VP Assistant to President
010031	VP-Office of the President
010041	University Secretary
010051	Institute for Advanced Jesuit
010052	Institute for Jesuit Sources


Another Query

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

BC_GM_PROPOSAL_SUBMIT_BY_DEPT - Submit Status by Dept

From Due Date: 

To Due Date: 

Dept: 

Proposal	Due Date	Title	Name	DeptID	Department	Sponsor	Sponsor Type	Proposal Type	Status	Purpose	1st Yr Bud Begin Date	1st Yr Bud End Date	Target Sponsor	Proposal Begin Date	Proposal End Date	Total Direct Cost	Total Proposal F&A	Total Proposal Budget
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REPORTS

Financial Management

- <http://www.bc.edu/research/osp/assistedoc.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**