GMQs
Tools for Managing Contracts and Grants

January 22, 2009
GMQs

Who?
What?
When?
Where?
Why?
How?
Grant Management Queries

- Tools for administrators
- Standard results
- Simplified data sets
The Whos of GMQs

- Written and maintained by the Research Office
- Can be used by anyone with access to Query Viewer in UD Financials
Where are the GMQs?

- FIRPT - The ‘report’ instance of PS
- [http://www.udel.edu/financials](http://www.udel.edu/financials)
- Link from Research Office website
  → Researcher’s Toolbox
  → Grants Management Guide
  → Web Resources
  → UD Financials reporting (FIRPT)
## Query Viewer

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

### Search By:
- **Query Name** begins with:

### My Favorite Queries

<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>Schedule</th>
<th>Remo</th>
</tr>
</thead>
<tbody>
<tr>
<td>GMQ_TRANSACTIONS_GL_DETAIL</td>
<td>trans for date range and Purp</td>
<td>Public</td>
<td></td>
<td>HTML</td>
<td>Excel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GMQ_TRANSACTIONS_SALARY</td>
<td>find sal trans in date range</td>
<td>Public</td>
<td></td>
<td>HTML</td>
<td>Excel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GMQ_TRANS_PROCARD</td>
<td>trans for date range and Purp</td>
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<td></td>
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<td>Excel</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Clear Favorites List](#)
How to use GMQs

• Optional prompts – all or nothing
• Wildcards (%) in required fields
• Downloading results to Excel
• Reporting levels – Dept, PI, award, project
• Timing-out – try narrowing criteria
### GMQ_PI_PROPOSALS - List of Proposals by PI

<table>
<thead>
<tr>
<th>Proposal ID or %:</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Name (opt'1):</td>
<td></td>
</tr>
<tr>
<td>Primary PI LName% or %:</td>
<td>Smith%</td>
</tr>
<tr>
<td>Proposal Status (opt'1):</td>
<td></td>
</tr>
</tbody>
</table>

**View Results**

Download results in:  Excel Spreadsheet  CSV Text File  (3 kb)

View All

<table>
<thead>
<tr>
<th>Primary PI</th>
<th>Project PI</th>
<th>Proposal ID</th>
<th>Proposal Project</th>
<th>Short Title</th>
<th>Long Title</th>
<th>Proposal Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith Carrie</td>
<td>Smith Carrie</td>
<td></td>
<td></td>
<td>PEARSON</td>
<td>Passive vs Inactive Learning in</td>
<td></td>
</tr>
</tbody>
</table>
Excel download results

<table>
<thead>
<tr>
<th>List of Proposals by PI</th>
<th>Primary PI</th>
<th>Project PI</th>
<th>Proposal ID</th>
<th>Proposal Project</th>
<th>Short Title</th>
<th>Long Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Smith, Carrie Veronica</td>
<td>Smith, Carrie Ve</td>
<td>07000126</td>
<td>000000000003460</td>
<td>PEARSON PASSIVE VS INACTIVE</td>
<td>Passive vs Inactive Learning in the introduction to Psychology</td>
</tr>
<tr>
<td></td>
<td>Smith, Charles W</td>
<td>Smith, Charles W</td>
<td>0225730010</td>
<td>BART43211903000</td>
<td>CALTECH/NASA L1 MONITORS</td>
<td>Forecasting Shocks And Energetic Particle Hazards Using L1 Monitors</td>
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<td></td>
<td>Smith, Charles W</td>
<td>Smith, Charles W</td>
<td>0125730010</td>
<td>BART37213201000</td>
<td>(D) NASA IMF TURBULENCE</td>
<td>Comparative Study Of Interplanetary Magnetic Field Turbulence At High And Low Latitudes Using The Ulysses And Voyager Spacecraft</td>
</tr>
</tbody>
</table>
How to use GMQs

• Optional prompts – all or nothing
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When GMQs Help

You have questions.

Maybe there are questions you don’t even know you should be asking!

QUESTIONS!!!
What awards do my PIs have?
What is budgeted?
What’s the F&A rate?
Who’s paid on this project?
What charges are hitting this project?
Are we meeting the match commitment?
What’s the award #?
Who needs a funding change?
Has the sponsor paid us?
How much is left to spend?
GMQs Have Answers
To get a list of active awards:

GMQ_PI_PROJECTS

PI or Co-PI EMPLID (opt'l):
----------------------------------

Project (opt'l):
----------------------------------

Ref Awd #(opt'l):
----------------------------------

Sponsor Name (opt'l):
----------------------------------

5 digit DEPTID (opt'l):
----------------------------------
To get balances:

- GMQ_PI_GRANT_BALS
- GMQ_PI_GRANT_BALS_CATEGORY
- GMQ_PI_GRANT_BALS_BY_ACCT
<table>
<thead>
<tr>
<th>Project</th>
<th>Sponsor Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Title</td>
<td>Cost Share Budget</td>
</tr>
<tr>
<td>Purpose</td>
<td>Acts (&amp;195000 prior to Grants)</td>
</tr>
<tr>
<td>Purpose Title</td>
<td>Grants</td>
</tr>
<tr>
<td>PI</td>
<td>F&amp;A</td>
</tr>
<tr>
<td>Start Date</td>
<td>CostShareActuals</td>
</tr>
<tr>
<td>End Date</td>
<td>Balance (Bud-(Act+F&amp;A))</td>
</tr>
<tr>
<td>FA Rate %</td>
<td></td>
</tr>
<tr>
<td>Project</td>
<td>EXPENSE CATEGORY</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>BART37217308000</td>
<td>GL_BENEFITS</td>
</tr>
<tr>
<td>BART37217308000</td>
<td>GL_FACULTY SAL</td>
</tr>
<tr>
<td>BART37217308000</td>
<td>GL_OVERHEAD</td>
</tr>
<tr>
<td>BART37217308000</td>
<td>GL_SUPPLIES</td>
</tr>
<tr>
<td>BART37217308000</td>
<td>GL_TRAVEL</td>
</tr>
</tbody>
</table>
To get payment information:

- GMQ_CASH_NOT_PS_BILL
- GMQ_CASH_PS_BILLED
- GMQ_CASH_THRU_2002
To monitor transactions:

- GMQ_TRANSACTIONS_GL_DETAIL

Enter a date range and get a list of every expense and/or revenue transaction that hit the ledger.
Other transaction queries:

- GMQ_TRANSACTIONS_SALARY
- GMQ_TRANS_PROCARD
- GMQ_TRANS_COSTSHARE
- GMQ_TRANS_SUBCONTRACTS
What actions are needed?

- **GMQ_BAL_PURP_PROJ_CONFLICT**
  If bals found, run GMQ_TRANS_PURP_PROJ_CONFLICT as a 2\textsuperscript{nd} step

- **GMQ_LAM_CHANGE_REQUIRED**

- **GMQ_INACTIVE_24MOS**

- **GMQ_TRANS_UNALLOWABLE**

- **GMQ_CLOSEOUT_PENDING**
GMQs for other answers:

• Conflict of interest expirations
• PI effort
• Find contract #s
• Cost share committed and met
• F&A distributions
• RBB topics
• Proposals
For more information

• Dawn Yasik
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X0446

Thank you for coming!