



FSR Milestone Query

Running the Query in Compass

1. Navigate to the Compass Production Environment and log in: https://compass-login.emory.edu

EMORY EMORY Financial System	Management
Notice: DUO two-factor authentication is no network. Instructions for enrolling are availabl desk: 404-727-7777 (Emory U	w required to log in to this system from outside of the Emory e at it.emory.edu/duo. If you need assistance, contact your service niversity) or 404-778-4357 (Emory Healthcare).
Password	University Employees: Forget Namourd? Heabbare Employees: Forget Namourd? Other Ause Margins in 7 If you have any quantions, problems, or comments, please contact the Finance Support Center through one of the following: • Logging a ticket request therup. • Logging a ticket request herup. • Imair: Frase-Support Centergenory.de • Phone: 404-727-7000 For any start-hours, technical, computer-related questions, problems, or comments, please contact the Emory University Service Desk at (404) 727-7777 or the Emory Healthcare Service Desk at (404) 778-4357 (6-HELP).

2. In Compass navigate to:

Main Menu 👻 > Reporting Tools 👻

> Reporting Tools -> Query -> Query Viewer

Favorites 🔻	Main	Menu 🔻			,						
Â		۸		-							
Compass		Risk Management		•							
-		Resource Management	t			-					
		Reporting Tools		Query			Schedule Qu	ery			
Top Menu Feat		Real Time Bottom Line		PS/nVision	6						
		Real Estate Manageme		Pivot Grid	L		Query Manager				
T I		Quality		Emory Reporting	g Library		×.				
The menu is nov		Purchasing		Emory Custom	Reports		•				
Highlights		Proposal Management		BI Publisher			•				
Recently Used		Project Costing		Reporting Cons	ole			-			
Favorites menu		Program Management		Report Manager			· · · · ·	PeopleSola 2			

3. Add Query Viewer to your Favorites by using the link at the top right of screen:







4. In Query Viewer, search for the Public FSR Query: EU_GM_FSR_MILESTONE_FRC_FRA_A

Query Viewer		
Enter any information you have and click Search. Le *Search By Query Name Search Advanced Search	ave fields blank for a li begins with	ist of all values. %FSR_MILESTONE%

*Using the % before and after key words will return all items with that search parameter

5. Click the Favorite link associated with the Query to add it to your Favorites.

Search Results											
*Folder View - All Folders											
Query Personalize Find View All 🗷 🔢 First 🕚 1-3 of 3 🕑 La											
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites		
EU_GM_FSR_MILESTONE_FRC_FRA_A	FINANCIAL MILESTONE REPORT	Public	COMPLETE	HTML	Excel	XML	Schedule	Lookup References	Favorite		
EU_GM_FSR_MILESTONE_FRC_FRA_A1	FINANCIAL MILESTONE REPORT	Public	GRANTS	HTML	Excel	XML	Schedule	Lookup References	Favorite		
EU_GM_FSR_MILESTONE_FRC_FRA_BL	FINANCIAL MILESTONE REPORT	Public	GRANTS	HTML	Excel	XML	Schedule	Lookup References	Favorite		

- 6. Select Desired Results: HTML, Excel, or Schedule.
 - a. For this job aid purpose we are using **Excel** as the output.
- 7. Enter the **dates** for the FSR Milestones that you would like to review for your assigned units by using the calendar or manually typing the dates into the cells.

Enter FSR Due Date From :	01/01/2017
Enter FSR Due Date To :	03/31/2017
EU_GM_FSR_MILESTONE_F	RC_FRA_A - FINANCIAL MILESTONE REPORT
FSR Due Date From (Required) 01/01	<mark>//2017</mark>
FSR Due Date To (Required) 03/31	I/2017 前
FSR Status	
Enter Dept From (Blank =All)	
Enter Dept To (Blank =All)	
RESEARCH UNIT (Blank = All)	
FRC Completer ID (Blank = All)	
FRA Approver ID(Blank = All)	
View Results	

8. Click View Results Button.



Job Aid: FSR Milestone Query



9. A pop-up window will appear to open the Excel spreadsheet.



10. Click OK.

11. Click on Enable Editing button.



The Excel spreadsheet opens...

K	। 🗄 ५२ 🗟 -			EU_GN	_FSR_MILESTC	NE_FRC_FRA	_A_110697	5281 [Read-Only] - Excel				
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A	A1 • : $X \swarrow f_X$ Financial milestone report											
	Α	В	С	D	E	F	G	н	1	J		
1	FINANCIAL MILESTONE REPORT	318										
2	Contract	Sponsor	Ref Awd #	Begin Date	End Date	Due	Purpose	PI Name	Dept	Dept Name		
3	000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007	12/31/2016	1/31/2017	RSRCH	Grossniklaus, Hans Edwin	734528	SOM: Ophthal: Oculo-Pathology		
4	000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007	12/31/2016	1/31/2017	RSRCH	Grossniklaus, Hans Edwin	734528	SOM: Ophthal: Oculo-Pathology		
5	000000696	NATL ALLIANCE FOR RES ON SCHIZOPHRENIA A	15334	7/1/2008	7/1/2017	2/28/2017	RSRCH	Ousley,Opal Y	737000	SOM: Psych: Admin		
6	000000696	NATL ALLIANCE FOR RES ON SCHIZOPHRENIA A	15334	7/1/2008	7/1/2017	3/28/2017	RSRCH	Ousley,Opal Y	737000	SOM: Psych: Admin		
7	000001329	BURROUGHS WELLCOME FUND	1008188	2/1/2009	8/31/2017	3/31/2017	TRAIN	McCarty,Nael A.	861900	GRS: Special Projects		
8	0000002124	RESEARCH TO PREVENT BLINDNESS	RPB UNRESTRICTED GRA	7/1/2008	6/30/2017	1/30/2017	RSRCH	Beck,Allen D	734502	SOM: Ophthal: Chairman		
9	0000002124	RESEARCH TO PREVENT BLINDNESS	RPB UNRESTRICTED GRA	7/1/2008	6/30/2017	1/31/2017	RSRCH	Beck,Allen D	734502	SOM: Ophthal: Chairman		
10	0000004837	NIH NATL INSTITUTE OF HEALTH	5R01CA143107-06	1/1/2010	12/31/2016	3/1/2017	RSRCH	Zhou, Muxiang	736542	SOM: Peds: Neuro-Oncology		
11	0000004837	NIH NATL INSTITUTE OF HEALTH	5R01CA143107-06	1/1/2010	12/31/2016	3/31/2017	RSRCH	Zhou, Muxiang	736542	SOM: Peds: Neuro-Oncology		
12	0000005917	NIH NATL INSTITUTE OF HEALTH	5P01HL101398-05 Revi	9/1/2010	2/17/2017	1/29/2017	RSRCH	Quyyumi,Arshed Ali	733005	SOM: Medicine: Cardiology		
13	0000005917	NIH NATL INSTITUTE OF HEALTH	5P01HL101398-05 Revi	9/1/2010	2/17/2017	2/28/2017	RSRCH	Quyyumi,Arshed Ali	733005	SOM: Medicine: Cardiology		
14	000006763	NIH NATL INSTITUE ON DEAFNESS AND OTHER	5R01DC006483-10	1/1/2011	12/31/2016	3/1/2017	RSRCH	Lin,Xi Erick	735500	SOM: Otolaryngology:Admin		
15	000006763	NIH NATL INSTITUE ON DEAFNESS AND OTHER	5R01DC006483-10	1/1/2011	12/31/2016	3/31/2017	RSRCH	Lin,Xi Erick	735500	SOM: Otolaryngology:Admin		
16	0000007553	US ENVIRONMENTAL PROTECTION AGENCY	83479901	1/1/2011	12/31/2016	1/31/2017	RSRCH	Tolbert,Paige E	813000	SPH: Environmental Health		
17	0000007553	US ENVIRONMENTAL PROTECTION AGENCY	83479901	1/1/2011	12/31/2016	3/31/2017	RSRCH	Tolbert,Paige E	813000	SPH: Environmental Health		
18	000008669	ANDREW W MELLON FOUNDATION	40900667	1/1/2010	8/31/2018	1/15/2017	OTHER	Sterk,Claire Elizabeth	900000	EVP Academic Affairs & Provost		
19	000008669	ANDREW W MELLON FOUNDATION	40900667	1/1/2010	8/31/2018	1/31/2017	OTHER	Sterk,Claire Elizabeth	900000	EVP Academic Affairs & Provost		





Research Administration Services

EMORY

Sorting & Filtering the Data:

Note: You must sort the entire population of data to look at the specific awards pertaining to your unit.

12. Highlight Row 2, and select the Filter Option under the Data tab in Excel.

E	ILE HOME INSERT PAGE I	LAYOUT FORMULAS DATA REVIEW VIEW	ACROBAT		
Fre Acc	From From Other Text Sources* Get External Data	Contract	Clear Reapply Advanced Text to Flash Columns Fill	Remove Duplicates Val	Data Con idation + Data Tools
	А	В	С	D	E
1	FINANCIAL MILESTONE REPORT	318			
2	Contract	Sponsor	Ref Awd #	Begin Date	End Date
3	000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007	12/31/2016
4	000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007	12/31/2016
5	000000696	NATL ALLIANCE FOR RES ON SCHIZOPHRENIA A	15334	7/1/2008	7/1/2017
6	000000696	NATL ALLIANCE FOR RES ON SCHIZOPHRENIA A	15334	7/1/2008	7/1/2017
7	0000001329	BURROUGHS WELLCOME FUND	1008188	2/1/2009	8/31/2017

*Drop down tabs will now appear on the column headers in row two so that you can sort/filter.

FILE HOME INSERT PAGE	LAYOUT FORMULAS DATA REVIEW VIEW	ACROBAT								
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A2 \checkmark : \checkmark f_x Contract										
А	В	С	D E	F						
1 FINANCIAL MILESTONE REPORT	218									
2 Contract	Sponsor	🗸 Ref Awd #	Begin Da 🔽 End Dat	e 🔻 Due 🛛 👻						
3 000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007 12/31/2	016 1/31/2017						
4 000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007 12/31/2	016 1/31/2017						

13. On Column **J**, '**Dept Name**', select the drop down tab, and select **Sort A to Z**. To filter, select the appropriate, individual departments and click **OK**.





Job Aid: FSR Milestone Query



14. If sorting, start by deleting any Awards that do not pertain to your unit.

- a) i.e. If you are only working on ECAS (for job aid purposes), delete all other Awards.
- b) By deleting those that do not pertain, instead of the 318 delivered in the original report, you are left with only 30. <u>But, you are not yet done sorting/filtering.</u>

F	FILE HOME INSERT PAGELAYOUT FORMULAS DATA REVIEW VIEW ACROBAT											
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1	A	В	С	D	E	F	G	н	1		J	
1	FINANCIAL MILESTONE REPORT	318							_			
2	Contract -	Sponsor 👻	Ref Awd #	Begin Da 👻	End Date -	Due 🔻	Purpo -	PI Name 🗸	Dept -	Dept Name		_
3	0000029266	LILLY ENDOWMENT	2014 0605-000	12/1/2014	12/31/2019	1/31/2017	OTHER	Long, Thomas G	885520	Candler Scho	ool Of Theology	
4	0000033858	ULLY ENDOWMENT	2015 1038	11/1/2015	12/31/2018	3 2/28/2017	OTHER	Strom, Jonathan N.	885520	Candler Scho	ol Of Theology	
5	0000035998	LILLY ENDOWMENT	2016 0095	3/1/2016	12/31/2019	1/31/2017	RSRCH	Smith, Theodore A	885520	Candler Scho	ool Of Theology	
6	0000035998	ULLY ENDOWMENT	2016 0095	3/1/2016	12/31/2019	1/31/2017	RSRCH	Smith, Theodore A	885520	Candler Scho	ool Of Theology	
7	0000018089	COMMUNITY FOUNDATION FOR GREATER	MOU	7/1/2011	12/31/2016	3/31/2017	OTHER	Rich, Michael	903500	CenterforCo	mmunityPartner	rships
8	0000036302	ST LOUIS UNIVERSITY	00031846-1	7/1/2016	6/30/2018	3 1/31/2017	RSRCH	Little,Peter Deal	832000	ECAS: Anthro	opology	
9	0000021914	UNIVERSITY OF GEORGIA	RR166-501/4708616	7/1/2014	2/28/2017	3/30/2017	RSRCH	Corces,Victor G.	831000	ECAS: Biolog	Y	
10	0000033473	NATL SCIENCE FOUNDATION	1557724	3/1/2016	2/28/2019	3/31/2017	RSRCH	De Roode, Jacobus Corne	831000	ECAS: Biolog	Y	
11	0000036649	ATLANTA RESEARCH AND EDUCATION FDT	KMR1B7	1/17/2016	6/30/2017	1/15/2017	IPA	De Roode, Jacobus Corne	831000	ECAS: Biolog	Y	
12	0000009100	US DEPARTMENT OF ENERGY	DE-FG02-01ER15153	8/15/2010	1/14/2017	3/13/2017	RSRCH	Heaven, Michael C	831010	ECAS: Chemi	istry	
13	0000009205	US DEPARTMENT OF ENERGY	DE-FG02-07ER15906/ 9	9/1/2010	8/31/2017	1/31/2017	RSRCH	Hill,Craig Livingston	831010	ECAS: Chem	istry	
14	0000018119	US AIR FORCE	FA9550-13-1-0002	11/1/2012	10/31/2017	1/30/2017	RSRCH	Heaven, Michael C	831010	ECAS: Chem	istry	
15	0000018918	US DEPARTMENT OF ENERGY	DE-FG02-97ER14782	11/1/2012	10/31/2010	1/29/2017	RSRCH	Bowman, Joel M	831010	ECAS: Chemi	istry	
10	0000026694	USARMY	W911NF-14-1-0208 P000	5/15/2014	11/14/2017	1/30/2017	RSRCH	Bowman, Joel M	831010	ECAS: Chemi	istry	_
1/	0000027550	NASA Cilead Equadation	NNX15AH74G-001	3/31/2015	2/28/2016	2/1/2017	OTHER	Vidicus Weaver, Susanna	831010	ECAS: Chemi	istry	
10	0000035537	Gliead Foundation		12/15/2015	12/31/2010	3/21/2017	OTHER	Liotta, Dennis C	831010	ECAS: Chemi	istry	
20	0000037072	IOHN TEMPLETON FOUNDATION	51436	1/1/2015	6/30/2017	1/31/2017	OTHER	McCauley Robert Neil	837020	ECAS: Ctr Mi	nd Brain & Cultur	10
21	0000027127	IOHN TEMPLETON FOUNDATION	54555	4/1/2013	3/31/2020	1/31/2017	OTHER	Negi Satva Dev	837060	ECAS: Emory	Tihet Partnershi	in
22	0000030686	US DEPARTMENT OF COMMERCE	NA15NMF4270347	9/1/2015	8/31/2017	3/31/2017	RSRCH	Yandle Tracy Jane	832030	ECAS: Enviro	nmental Science	P P
23	0000011897	ANDREW W MELLON FOUNDATION	41000726	5/1/2011	12/31/2017	3/31/2017	OTHER	Forman Robin	836150	FCAS: I W In	hnson Institute	
24	0000035558	Oatar University	NPRP-8-992-5-133	2/10/2016	2/10/2017	3/4/2017	OTHER	Margariti, Roxani Eleni	833090	ECAS: MESAS	5	
25	0000035558	Qatar University	NPRP-8-992-5-133	2/10/2016	2/10/2017	3/27/2017	OTHER	Margariti, Roxani Eleni	833090	ECAS: MESAS	5	
26	0000036078	AMER COUNCIL OF LEARNED SOCIETY		8/1/2016	7/31/2017	2/28/2017	FLWSH	Karnes, Kevin C	833100	ECAS: Music		
27	0000036011	AMER COUNCIL OF LEARNED SOCIETY		8/1/2016	7/31/2017	2/28/2017	FLWSH	Mitchell, Andrew John	833110	ECAS: Philos	ophy	
28	0000028820	UNIVERSITY OF GOTHENBURG	M13-0559:1	7/1/2014	12/31/2016	3/1/2017	RSRCH	Glynn,Adam N	832060	ECAS: Politic	al Science	
29	0000028820	UNIVERSITY OF GOTHENBURG	M13-0559:1	7/1/2014	12/31/2010	3/31/2017	RSRCH	Glynn,Adam N	832060	ECAS: Politic	al Science	
30	0000030099	UNIVERSITY OF GOTHENBURG	F2014/69	10/1/2014	10/30/2010	2/28/2017	RSRCH	Staton, Jeffrey	832060	ECAS: Politic	al Science	
31	0000030099	UNIVERSITY OF GOTHENBURG	F2014/69	10/1/2014	10/30/2010	3/31/2017	RSRCH	Staton, Jeffrey	832060	ECAS: Politic	al Science	
32	0000031184	NATL ENDOWMENT FOR HUMANITIES	FV-230920-15	10/1/2015	12/31/2010	2/28/2017	OTHER	Klehr, Harvey	832060	ECAS: Politic	al Science	
33	0000031184	NATL ENDOWMENT FOR HUMANITIES	FV-230920-15	10/1/2015	12/31/2016	3/31/2017	OTHER	Klehr, Harvey	832060	ECAS: Politic	al Science	
34	0000022878	BRAIN & BEHAVIOR RSCH FDTN	21614	1/15/2014	1/14/2017	7 3/15/2017	RSRCH	Trotman, Hanan	832070	ECAS: Psychol	ology	
35	0000030562	NIH NATL INSTITUTE OF MENTAL HEALTH	5R00MH102355-05	2/9/2015	12/31/2017	3/30/2017	RSRCH	Treadway, Michael Tilghn	832070	ECAS: Psychol	ology	
36	0000031108	BRAIN & BEHAVIOR RSCH FDTN	20547	1/15/2014	1/14/2017	3/14/2017	RSRCH	Treadway, Michael T	832070	ECAS: Psychol	ology	
37	0000034885	AMER PSYCHOLOGICAL ASSOCIATION		11/4/2015	11/4/2010	1/3/2017	FLWSH	Marx,Lauren S	832070	ECAS: Psychol	ology	
38	0000008669	ANDREW W MELLON FOUNDATION	40900667	1/1/2010	8/31/2018	1/15/2017	OTHER	Sterk,Claire Elizabeth	900000	EVP Academ	ic Affairs & Prove	ost
39	0000008669	ANDREW W MELLON FOUNDATION	40900667	1/1/2010	8/31/2018	3 1/31/2017	OTHER	Sterk,Claire Elizabeth	900000	EVP Academ	ic Affairs & Prove	ost
40	0000034600	ASPEN INSTITUTE	AID-OAA-A-15-0038	8/1/2015	4/30/2018	3 1/24/2017	OTHER	Roberts, Peter William	872090	GBS: Faculty	Support / Resrch	a
41	0000034603	ASPEN INSTITUTE	AID-00AA-A-15-0038	8/1/2015	4/30/2018	3 1/24/2017	OTHER	Roberts, Peter William	872090	GBS: Faculty	Support / Resrch	a
42	0000001329	BURROUGHS WELLCOME FUND	1008188	2/1/2009	8/31/2017	3/31/2017	TRAIN	McCarty, Nael A.	861900	GRS: Special	Projects	

15. On Column P, **Status**, Sort A to Z, to see FSR Milestone Status:



COM - Completed PRG - In progress (Blanks) - Not started



Job Aid: FSR Milestone Query



16. Review the following columns to further identify your workload:

- a) On Column **O**, **MileCode**, Sort 'A to Z', to differentiate between Quarterly (QFSR), Interim (IFSR), Annual (AFSR), and Final (FFSR)
- b) On Column V, Action, Sort 'A to Z', to differentiate between RAS and FGC Workload
- c) On Column F, Due, Sort 'Oldest to Newest' to see what is due now
- d) On Column A, Contract, Sort 'A to Z' to identify duplicate milestones

14	0000028820	UNIVERSITY OF GOTHENBURG	M13-0559:1	7/1/2014 12/31/2016	3/1/2017 RSRCH	Glynn,Adam N	832060 ECAS: Political Science
15	0000028820	UNIVERSITY OF GOTHENBURG	M13-0559:1	7/1/2014 12/31/2016	3/31/2017 RSRCH	Glynn,Adam N	832060 ECAS: Political Science

Note: Some milestones may not be assigned appropriately so use caution before deleting lines.

Note: See RAS Launch Date for responsibilities related to Q and I FSRs.

*The example results in the image below and for job aid purposes assumes that you are in a RAS Unit and only working on Q and I FSRs at this time.

You've deleted all other rows and find that you have 6 FSRs due in the next few months:

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03 *	r_{3} r_{1} r_{2} r_{3} r_{4} r_{5}													
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1 FINANCIAL M	MILESTONE REPORT													
2 Contract	Sponsor 🗸	Ref Awd # 🗾 E	Begin Da 🗸	End Date 👻	Due 🖵	Purpo -	PI Name 💌	Dept -	Dept Name 🛛 💌	Туре 🗸	Awa -	Contri -	Mile 🔻	Mile (🔻
3 0000018119	US AIR FORCE	FA9550-13-1-0002	11/1/2012	10/31/2017	1/30/2017	RSRCH	Heaven, Michael C	831010	ECAS: Chemistry	PREPAID_TO_CR	ACP	ACTIVE	FINRE	QFSR
4 0000036302	ST LOUIS UNIVERSITY	00031846-1	7/1/2016	6/30/2018	1/31/2017	RSRCH	Little,Peter Deal	832000	ECAS: Anthropology	CR_NON_LOC	ACP	ACTIVE	FINRE	IFSR
5 0000009205	US DEPARTMENT OF ENERGY	DE-FG02-07ER15906/ 9	9/1/2010	8/31/2017	1/31/2017	RSRCH	Hill,Craig Livingston	831010	ECAS: Chemistry	PREPAID_TO_CR	ACP	ACTIVE	FINRE	QFSR
6 0000027950	NASA	NNX15AH74G-001	3/31/2015	2/28/2018	1/31/2017	RSRCH	Widicus Weaver, Susanna	831010	ECAS: Chemistry	CR_LOC	ACP	ACTIVE	FINRE	QFSR
7 0000036011	AMER COUNCIL OF LEARNED SOCIETY		8/1/2016	7/31/2017	2/28/2017	FLWSH	Mitchell,Andrew John	833110	ECAS: Philosophy	AUTO_SCHED_PAY	ACP	ACTIVE	FINRE	IFSR
8 0000036078	AMER COUNCIL OF LEARNED SOCIETY		8/1/2016	7/31/2017	2/28/2017	FLWSH	Karnes,Kevin C	833100	ECAS: Music	AUTO_SCHED_PAY	ACP	ACTIVE	FINRE	IFSR
0														