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FSR Milestone Query

Running the Query in Compass

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

2. In Compass navigate to: Main Menu ▼ > Reporting Tools ▼ > Query ▼ > Query Viewer
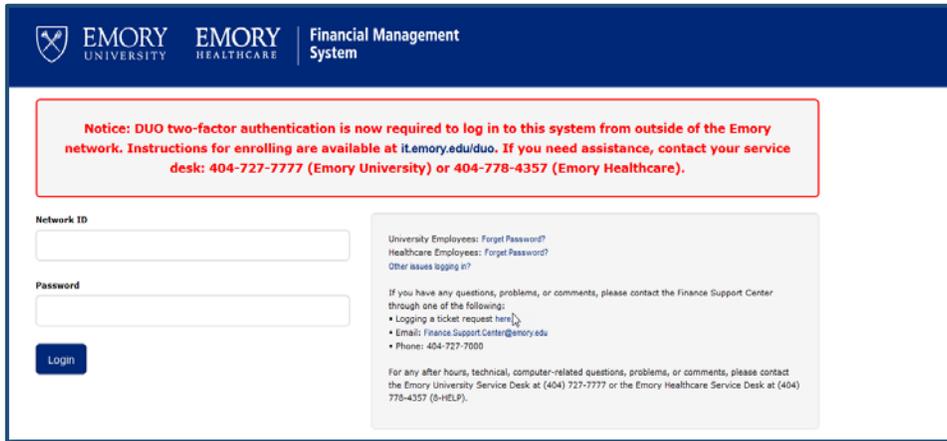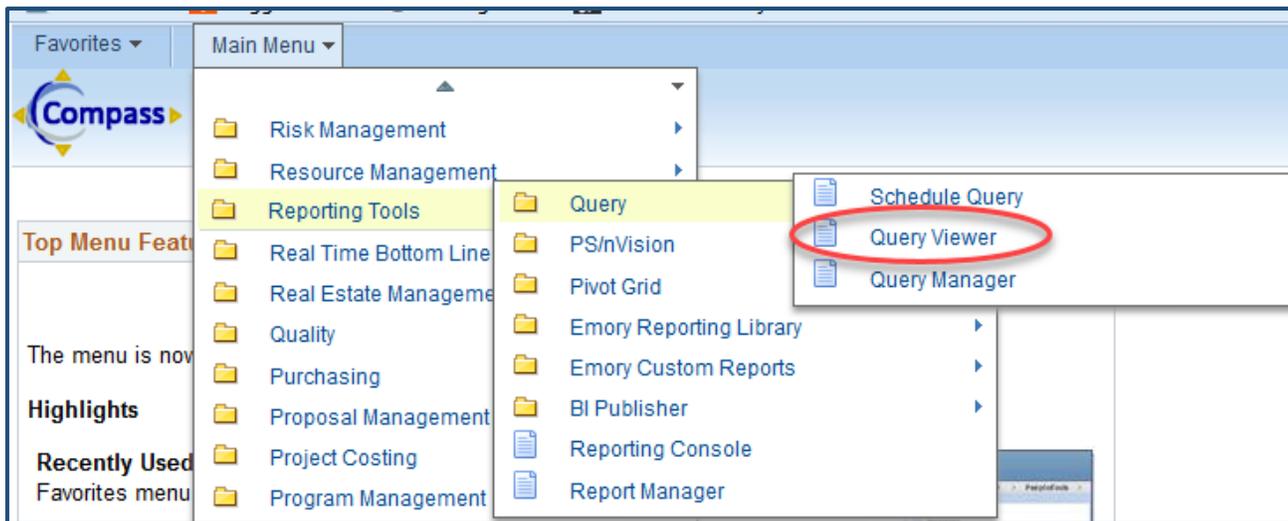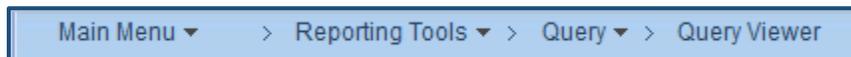
3. Add **Query Viewer** to your **Favorites** by using the link at the top right of screen:

Job Aid: FSR Milestone Query

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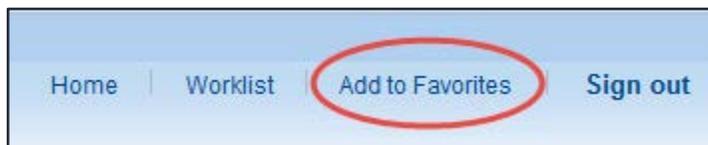
4. In Query Viewer, search for the Public FSR Query: **EU_GM_FSR_MILESTONE_FRC_FRA_A**

Query Viewer

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

> *Search By   Query Name   ▼   begins with   %FSR_MILESTONE%
>
> Search   Advanced Search

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 ▶ Last						
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_FRC_FRA_A - FINANCIAL MILESTONE REPORT

FSR Due Date From (Required) 01/01/2017 📅
FSR Due Date To (Required) 03/31/2017 📅
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.

9. A pop-up window will appear to open the Excel spreadsheet.
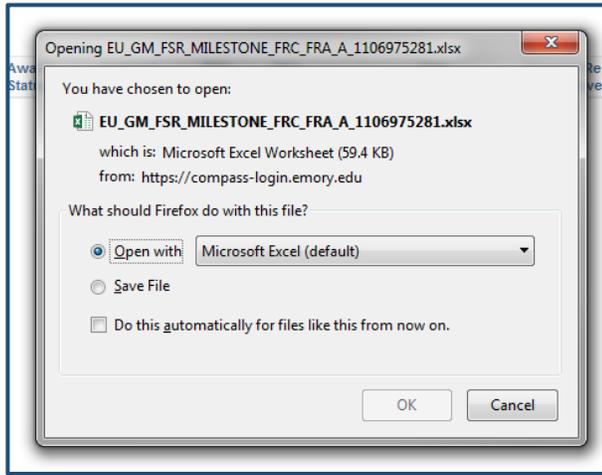
10. Click **OK**.

11. Click on **Enable Editing** button.
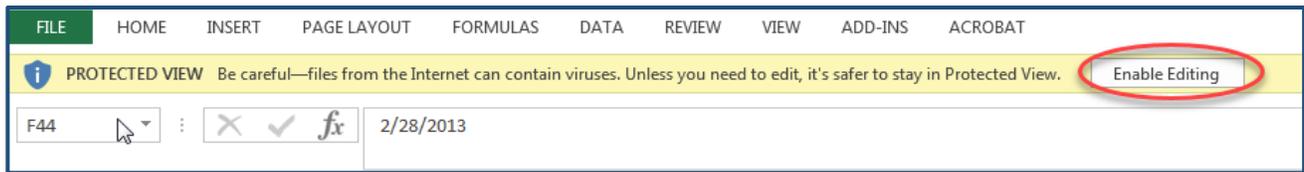
The Excel spreadsheet opens…

Contract	Sponsor	Ref Awd #	Begin Date	End Date	Due	Purpose	PI Name	Dept	Dept Name
0000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007	12/31/2016	1/31/2017	RSRCH	Grossniklaus,Hans Edwin	734528	SOM: Ophthal: Oculo-Pathology
0000000206	RESEARCH TO PREVENT BLINDNESS	SENIOR INVESTIGATOR	1/1/2007	12/31/2016	1/31/2017	RSRCH	Grossniklaus,Hans Edwin	734528	SOM: Ophthal: Oculo-Pathology
0000000696	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
0000000696	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
0000001329	BURROUGHS WELLCOME FUND	1008188	2/1/2009	8/31/2016	3/31/2017	TRAIN	McCarty,Nael A.	861900	GRS: Special Projects
0000002124	RESEARCH TO PREVENT BLINDNESS	RPB UNRESTRICTED GRA	7/1/2008	6/30/2016	1/30/2017	RSRCH	Beck,Allen D	734502	SOM: Ophthal: Chairman
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
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
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
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
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
0000006763	NIH NATL INSTIUE ON DEAFNESS AND OTHER	5R01DC006483-10	1/1/2011	12/31/2016	3/1/2017	RSRCH	Lin,Xi Erick	735500	SOM: Otolaryngology:Admin
0000006763	NIH NATL INSTIUE ON DEAFNESS AND OTHER	5R01DC006483-10	1/1/2011	12/31/2016	3/31/2017	RSRCH	Lin,Xi Erick	735500	SOM: Otolaryngology:Admin
0000007553	US ENVIRONMENTAL PROTECTION AGENCY	83479901	1/1/2011	12/31/2016	1/31/2017	RSRCH	Tolbert,Paige E	813000	SPH: Environmental Health
0000007553	US ENVIRONMENTAL PROTECTION AGENCY	83479901	1/1/2011	12/31/2016	3/31/2017	RSRCH	Tolbert,Paige E	813000	SPH: Environmental Health
0000008669	ANDREW W MELLON FOUNDATION	40900667	1/1/2010	8/31/2018	1/15/2017	OTHER	Sterk,Claire Elizabeth	900000	EVP Academic Affairs & Provost
0000008669	ANDREW W MELLON FOUNDATION	40900667	1/1/2010	8/31/2018	1/31/2017	OTHER	Sterk,Claire Elizabeth	900000	EVP Academic Affairs & Provost

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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.
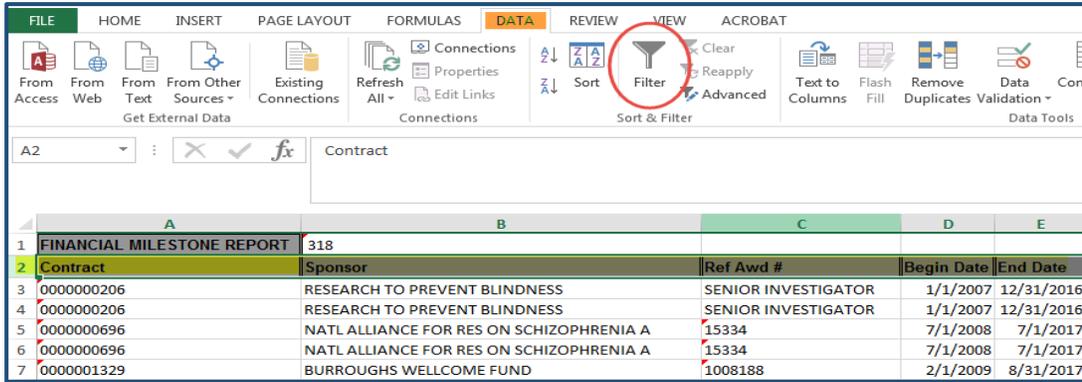
Drop down tabs will now appear on the column headers in row two so that you can sort/filter.
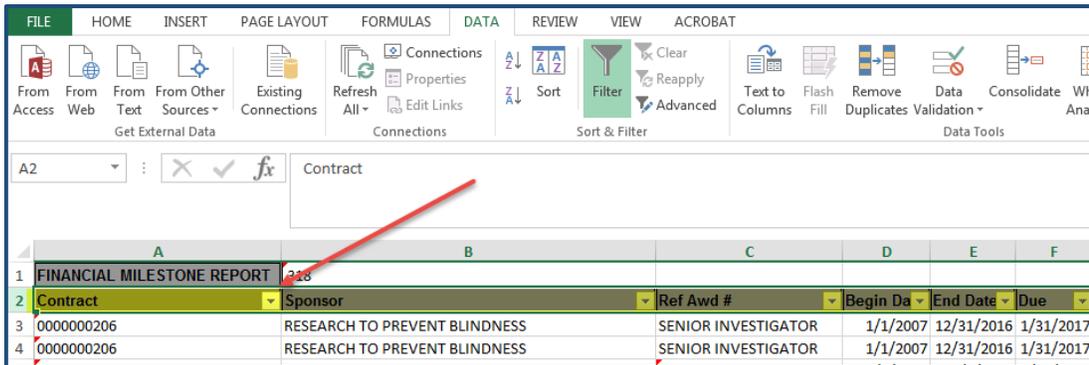
13. On Column **J**, '**Dept Name**', select the drop down tab, and select **Sort A to Z**. To filter, select the appropriate, individual departments and click **OK**.
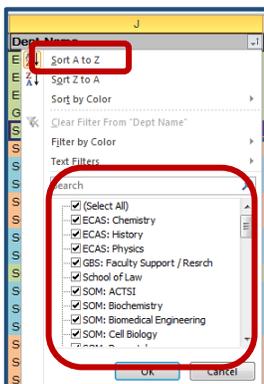
14. If sorting, start by deleting any Awards that do not pertain to your unit.

    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. But, you are not yet done sorting/filtering.*

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

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

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:*