

## QUICK REFERENCE GUIDE

November 1, 2019

### Run SWIFT Queries for Incoming Grants

This guide provides a listing of queries that are available in SWIFT, along with instructions on how to run the queries.

**Note:** There are extensive reporting resources for incoming Grants in OBIEE, the SWIFT Data Warehouse reporting and analysis tool, including:

Project and Grant subject matter areas:

- FMS – Projects and Grants – Contracts Revenue Accounting Entries
- FMS – Projects and Grants – Project MFR Detail
- FMS – Projects and Grants – Project MFR Summary
- FMS – Projects and Grants – Project Resource Transaction

Projects and Grants Dashboards:

- Projects MFR Summary
- Projects MFR Summary Excel
- Projects Summary
- Projects MFR Detail
- Projects MFR Detail Excel
- Project Resource Transactions
- Project Resource Transactions Excel
- Project Contracts Summary

### Step 1: Run SWIFT Queries for Grants

1. Navigate to the *Query Viewer* page using one of the options below:

Navigation Options	Navigation Path
<b>All Navigation Collections</b>	Access the <i>Query Viewer</i> page from all Navigation Collections from the <b>Need Help?</b> (top-right of page) under the <b>Common Utilities</b> folder.
<b>Grants WorkCenter</b>	Accounting, Grants Management, Grants WorkCenter, Reports/Queries tab, Queries section, State Queries. Some of the queries included in this guide are available in the <b>State Queries</b> section.

2. Enter your Search criteria, such as the name of the query you want to run. The names of frequently used queries are provided in the table below.

**Tip:** Click on the *Add to Favorites* link to add these queries to your **My Favorite Queries** listing so you won't have to search for them again.

**Query Viewer**

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

\*Search By  begins with

My Favorite Queries									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
M_AP_GBL_VCHR_STAT_DET	Check status of vouchers	Public	AP	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>
M_AP_GBL_VCHR_STAT_NOT_PAID		Public	AP	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>
M_KK_GBL_APPROPID_ATTRIB		Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>
M_KK_GBL_APP_ALL_BAL	Approp/Allot Balances	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>
M_KK_GBL_APP_BAL	Approp	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>
M_KK_GBL_EXP_BUD_ACCTS	Expense Budget Balance	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>
M_KK_GBL_NEG_ALLOTMENTS	Negative Allotments	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-"/>

Query Name	Description and Use
M_GM_GBL_GRNT_OVER_LIMIT_TRANS Over Bill Limit Grant Transactions	List of transactions that exceed the Billing Limit established for the grant.  <b>Use:</b> All agencies should routinely run this query and determine next steps. These transactions can cause issues on the SEFA report.
M_GM_GBL_PND_CNTRCT_TO_BILL Transactions Pending Billing	List of transactions pending billing for reimbursement. Query results will include BIL (billable) and DEF (deferred) transactions.  <b>Use:</b> Primarily used by agencies that bill for reimbursement.
M_GM_GBL_PND_CNTRCT_TO_BIL_DEF Deferred Transactions Pending to Billing	List of transactions that have been deferred on the billing worksheet.  <b>Use:</b> Used by agencies that bill for reimbursement. Deferred bills cannot be seen on the worksheet until the Deferred Date has been reached.
M_GL_GBL_JRNL_BUD_EXCEPTION_GM GL Journal Budget Exceptions	List of GM-masked general ledger journals from the contracts to billing process that are in error.  <b>Use:</b> Billing agencies should be routinely running this query to identify errors that must be resolved.

Query Name	Description and Use
M_GM_GBL_GRANT_DRAW_DTL_BY_CNT Grant Draw Detail by Contract	List of invoices generated for grant contract(s).  <b>Use:</b> Used by billing agencies to view the contract and invoice number(s) by accounting date.
M_GM_GBL_ACTIVE_PROJ_ACTIVITY Active Grant Projects & Activities	List of active grant projects and activities including start and end dates.  <b>Use:</b> All agencies can use this to review their assigned project and activities.
M_GM_GBL_PROJECTS_BY_CONTRACT Projects Associated w/Contract	List of projects associated with the contract.  <b>Use:</b> Agencies can view projects related to a contract.

- Click on the **Search** button. Queries display in the **Search Results** listing.  
**Tip:** Click on the *Favorite* link in the Add to Favorites column to add the query to your *My Favorites Queries* listing so you won't have to search for them again.

**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	Personalize	Find	View All	First	1 of 1	Last
M_GM_GBL_PND_CNTRCT_TO_BILL	HTML	Excel	XML	Schedule	Lookup References	Favorite

- In the *Search Results* listing, select the option you want for the output: select "HTML" to view the query results on the screen; or select "Excel" to download the results in a Microsoft Excel file. A new tab opens to run the query. (If you select "HTML", you have the option to export the results to Excel or another format after viewing the data on the *Results* page.)

M\_GM\_GBL\_PND\_CNTRCT\_TO\_BILL - Transactions pending to Billin

Business Unit

Project-Use % for all Projects

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(556 kb\)](#)

View All First 101-200 of 1135 Last

Unit	Project	Activity	Account	Fin DeptID	Fund	AppropID	An Type	Source Type	Category	Subcategory	Trans Date	Acctg Date	Bill Dt - DEF Rows	Descr	Sys Source	Contract	Line	BI Distrib	Quantity	BU Amount
101	R3201	R32GT0000000104	1	410001	R323E067	3000	R32E125	BIL	REIMB		05/01/2018	05/01/2018	01/01/1900		PRP	R320000104	1	P	0.00	2474.270
102	R3201	R32GT0000000104	1	410001	R323E073	3000	R32E125	BIL	REIMB		05/01/2018	05/01/2018	01/01/1900		PRP	R320000104	1	P	0.00	2021.130
103	R3201	R32GT0000000104	1	410001	R323E067	3000	R32E125	BIL	REIMB		05/01/2018	05/01/2018	01/01/1900		PRP	R320000104	1	P	0.00	1725.210
104	R3201	R32GT0000000104	1	410001	R323E067	3000	R32E125	BIL	REIMB		05/01/2018	05/01/2018	01/01/1900		PRP	R320000104	1	P	0.00	1725.200
105	R3201	R32GT0000000104	1	410001	R323E067	3000	R32E125	BIL	REIMB		05/01/2018	05/01/2018	01/01/1900		PRP	R320000104	1	P	0.00	1725.210

- Enter the prompt information which will vary, depending on which query you chose to run. Use the percent sign (%), when noted, as a Wild Card.

# SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

6. Press the **View Results** button.

- If you chose “HTML” for the output, the results will display on the page as shown in the print screen above. (You can export the results to Excel or another format by clicking on a link provided in the **Download results in** listing displayed below the **View Results** button.)
- If you chose “Excel”, a prompt appears asking what you want to do with the Excel file. Options include: “Open”, “Save”, or “Save As”.

