

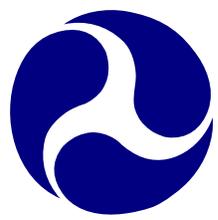


# TEAM-Web User Guide

## Chapter 11 *Dynamic Queries*

**By:**  
**QSSI**

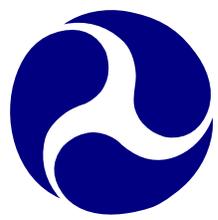
**Version: 2.03**  
**Date: 02/29/2008**



## Chapter 11 Change History

| Version | Date       | Description   | Change By                      |
|---------|------------|---|--------------------------------|
| 1.0     | 09/26/2007 | Initial Online Versions and updates                         | Travis Klein                   |
| 1.1     | 10/18/2005 | Formatting Changes and Updates                              | Travis Klein,<br>Sonya Ransome |
| 2.0     | 04/23/2007 | Major Formatting Changes and updates as required            | Travis Klein                   |
| 2.01    | 06/25/2007 | Continued formatting changes and updates                    | Travis Klein                   |
| 2.02    | 06/26/2007 | Continued formatting changes and updates including indexing | Travis Klein                   |
| 2.03    | 02/29/2008 | Minor reference modifications                               | Travis Klein                   |

*\* Note: previous versions of the online User Guide may have been updated as needed without consistent versioning. Some previous change versions may be omitted or estimated. Versioning shall be consistent henceforth.*



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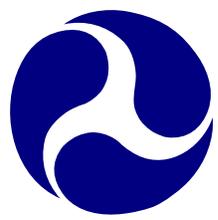
## Dynamic Queries

### Overview

This chapter will summarize the various types of queries available as well as how to perform and save the results of a dynamic query.

### Data Queries

- **Active Projects** – This report provides project totals for projects that have been obligated and not closed and shows only the current amendment for that project.
- **Active Recipients** – This report provides information on all TEAM recipients (customers) that are listed as Active.
- **Active Users** – This report provides data on Active Users of TEAM. Please note that suspended users are also shown.
- **Closed Projects** – This report provides basic data for all closed projects.
- **Closed and Deobligated** – This report provides basic data for all projects closed in the specified date range for projects that deobligated funds.
- **Cumulative Apportionments** – This report provides the cumulative data for the formula apportionment records of a specified account and/or UZA.
- **Cur. FY Apportionments** – This report will provide the formula apportionment totals for a specified account and/or UZA for the current year.
- **Cur. FY Obls by Amd.** – Data is available from Amendment 00 (Original Project) through latest amendment for:
  - Projects obligated in the current fiscal year-to-date,
  - Projects submitted for which funding has been reserved but not yet obligated,
  - Projects for which funding has not been reserved, and
  - Projects obligated this FY year for which deobligations have been made.
- **Cur. FY Obls by Funding Source** – Data is available for:
  - Projects obligated in the current fiscal year-to-date, and
  - Projects submitted for which funding has been reserved but not yet obligated.
- **DBE Obls. By Percent** – This report will provide the percentage of obligations for a grantee that is a Disadvantaged Business Enterprise by grantee id.
- **DBE UZA Data** – This report will provide the total obligations for a grantee that is a Disadvantaged Business Enterprise by UZA id.
- **Data - Inquire by State** – This is a report that allows a user to graphically select data for a specific State.
- **Deobligations** – This report provides basic data for all projects showing deobligations in the specified date range.



- **Disbursements and Refunds** – Data is available for disbursement and refund data, as imported from DELPHI, FTA's accounting system. \* Please note there is a lag between system data feeds and for up to the minute disbursement and refund information, it is better to go directly to DELPHI.
- **Disbursements by %** – This report provides disbursement data for active projects: percentage of disbursements over obligations, last disbursement date, etc.
- **Earmark Report** – This data query was developed to provide the user with a listing of all of the information on Program Earmarks. There is one row for each Earmark in the database. It includes information such as Fiscal Year of Earmark, Earmark ID, Earmark Program, Original Earmark Name, Original Amount, Status, State, unreserved Amount (amount remaining), and Notes.
- **Earmark Grant Report** – This data query was developed to provide the user with a listing of all of the information tracked at the Grant Earmark Level. There is one row for each Project Number and Earmark pairing. It also shows dates and amounts of project reservations, obligations, and dates sent for release and released, as reported in TEAM.
- **FSR Data** – Financial Status Report and other financial information is available for all projects obligated (but not closed) as of the end of the previously completed quarter.
- **FTA Recipient** – This report provides information for all TEAM recipients on file.
- **New Starts by Project** – This report provides information on all Active projects funded under the New Starts Program: section 03 with an approp code of 47 or 37. A filter on Project is provided.
- **New Starts by State** – This report provides information on all Active projects funded under the New Starts Program: section 03 with an approp code of 47 or 37. A filter on State is provided.
- **Obligations by Funding Source** – Data is available for the total Obligations, Reservations, and Deobligations for an account class code. The data for that account class codes UZA's and projects can be retrieved by clicking on the Excel link.
- **Operating Budget** – This report will provide the totals for the account class code at the account level. The UZA and project are not included in this report.
- **Pending Obligations** – Data is available for all projects reserved but not obligated.
- **Project Budget** – Project Budget Activity Line Item (ALI) data is available for all projects obligated this Fiscal Year to date: ALI amounts are calculated for each amendment.
- **Project Status Data** – Data is available for:
  - Projects obligated in the current fiscal year-to-date, and
  - Data is available for projects with status not closed.
- **Projects Ready for Award** – Data is available for all projects reserved but not obligated.
- **Recipient Contact Information** – Data is available for all Recipient Contacts. There is one row for each contact in the TEAM database. This query can be used to compile addresses for mailings, phone numbers for call lists, etc.



- **Reconciliation Data** – This report will show you the obligation discrepancies between the CFYOBL2, CFYFAP and the OPERBUD file. This report will also tell you which accounts have different available balances between the OPERBUD and CFYFAP files.
- **Team4Cmp** – This report contains financial data used for Accounting Department analysis.
- **95-100% Disbursed Report** – This report provides data for all projects that show disbursements of 95% or more of their obligated amounts, as reported by the most recent data feed from DELPHI, FTA's accounting system. Please note there is a lag between system data feeds and for up to the minute disbursement and refund information, it is better to go directly to DELPHI.

## Regional Queries

- **Application Status Report** – This report will provide a summarized view of all pending grant applications. It can be used as a management tool in determining individual workload, or estimate processing time.
- **Disbursement Activity Report** – Lists disbursement activity of active grants
- **Grant Approval Listing** – This report provides basic information for all active grants.
- **Projects 100% Disbursed** – Lists active projects that have been fully disbursed, and are candidates for project close-out.
- **Single Audit Report Submission** – This report lists disbursements by recipient, and can be used to determine recipients who might be subject to Single Audit report requirements. Effective July 2003, OMB Circular A-133 required recipients to submit a single audit report if they expended \$500,000 or more in Federal awards.
- **Summary of Active Project** – This report lists the number of active grants by recipient and state, totaling obligations for each recipient id. This report can be used as a monitoring tool to respond to requests for information from Headquarters, OIG, GAO and other agencies regarding FTA programs.
- **Summary of FSR Report** – This report lists report submission information by recipient. This report can be used as a used as a monitoring tool for project management staff in managing Financial Status and Milestone Status Reports.

## Performing a Query

1. For example purposes, the Data Query “Active Projects” will be used. Note: most of the Data Queries has varied default ‘Data Fields’ and ‘Additional Search Criteria,’ but the query premise is similar for the majority of the queries available (excluding the Data Query By State, for example, which is detailed in Chapter 1 of this User Guide.)
2. The Data Query opens up with all of the available data fields selected. The resulting query report will display the fields in the order in which you have selected them (for example, Data Field #1 will be column ‘A’ in the Excel report that can be generated).
3. The Select None and Select All buttons can be used to very quickly remove or replace all of the data fields with the click of one button. (See Figure 1 to note how the form is initially displayed as well as how the form is viewed after clicking on the Select None and Select All features).



### Active Projects

This report provides project totals for projects that have been obligated and not closed and shows only the current amendment for that project.

| Data Fields             |                           |
|-------------------------|---------------------------|
| 1. Cost Center          | 2. Recipient ID           |
| 3. Recipient Name       | 4. Project ID             |
| 5. Obligation Date      | 6. Brief Description      |
| 7. Disbursement         | 8. Auth Disbursement      |
| 9. Refunds              | 10. Previous Reservation  |
| 11. Change Reservation  | 12. Previous Obligation   |
| 13. Change Obligation   | 14. Previous Deobligation |
| 15. Change Deobligation |                           |

| Additional Search Criteria |              |
|----------------------------|--------------|
| Recipient ID:              | Not Selected |
| Cost Center:               | Not Selected |
| Project Number:            |              |

| Data Format       |       |
|-------------------|-------|
| Format Type:      | Excel |
| Column Delimiter: | Comma |
| Column Headings:  | Yes   |

Submit

### Active Projects

This report provides project totals for projects that have been obligated and not closed and shows only the current amendment for that project.

| Data Fields      |                  |
|------------------|------------------|
| 1. Not Selected  | 2. Not Selected  |
| 3. Not Selected  | 4. Not Selected  |
| 5. Not Selected  | 6. Not Selected  |
| 7. Not Selected  | 8. Not Selected  |
| 9. Not Selected  | 10. Not Selected |
| 11. Not Selected | 12. Not Selected |
| 13. Not Selected | 14. Not Selected |
| 15. Not Selected |                  |

| Additional Search Criteria |              |
|----------------------------|--------------|
| Recipient ID:              | Not Selected |
| Cost Center:               | Not Selected |
| Project Number:            |              |

| Data Format       |       |
|-------------------|-------|
| Format Type:      | Excel |
| Column Delimiter: | Comma |
| Column Headings:  | Yes   |

Submit

### Active Projects

This report provides project totals for projects that have been obligated and not closed and shows only the current amendment for that project.

| Data Fields             |                           |
|-------------------------|---------------------------|
| 1. Cost Center          | 2. Recipient ID           |
| 3. Recipient Name       | 4. Project ID             |
| 5. Obligation Date      | 6. Brief Description      |
| 7. Disbursement         | 8. Auth Disbursement      |
| 9. Refunds              | 10. Previous Reservation  |
| 11. Change Reservation  | 12. Previous Obligation   |
| 13. Change Obligation   | 14. Previous Deobligation |
| 15. Change Deobligation |                           |

| Additional Search Criteria |              |
|----------------------------|--------------|
| Recipient ID:              | Not Selected |
| Cost Center:               | Not Selected |
| Project Number:            |              |

| Data Format       |       |
|-------------------|-------|
| Format Type:      | Excel |
| Column Delimiter: | Comma |
| Column Headings:  | Yes   |

Submit

Figure 1

- There are three different search criteria for this particular Data Query. They may be used simultaneously, or individually. If no search criterion is entered, then every applicable record will be queried (in this case Active Projects – see Figure 3).



5. Use the drop down menus to select a Recipient ID and/or Cost Center.
6. If you choose, you may enter a Project Number, or a portion of a project number as a search criterion as well.
7. The Data Format section defaults to Excel, Comma delimited, and displayed column headings (Figure 3).
8. Use the drop down menus to make any of the other available selections shown (Figure 2 and Figure 3).
9. Click the Submit button when you are satisfied with all of you search criteria (Figure 3).

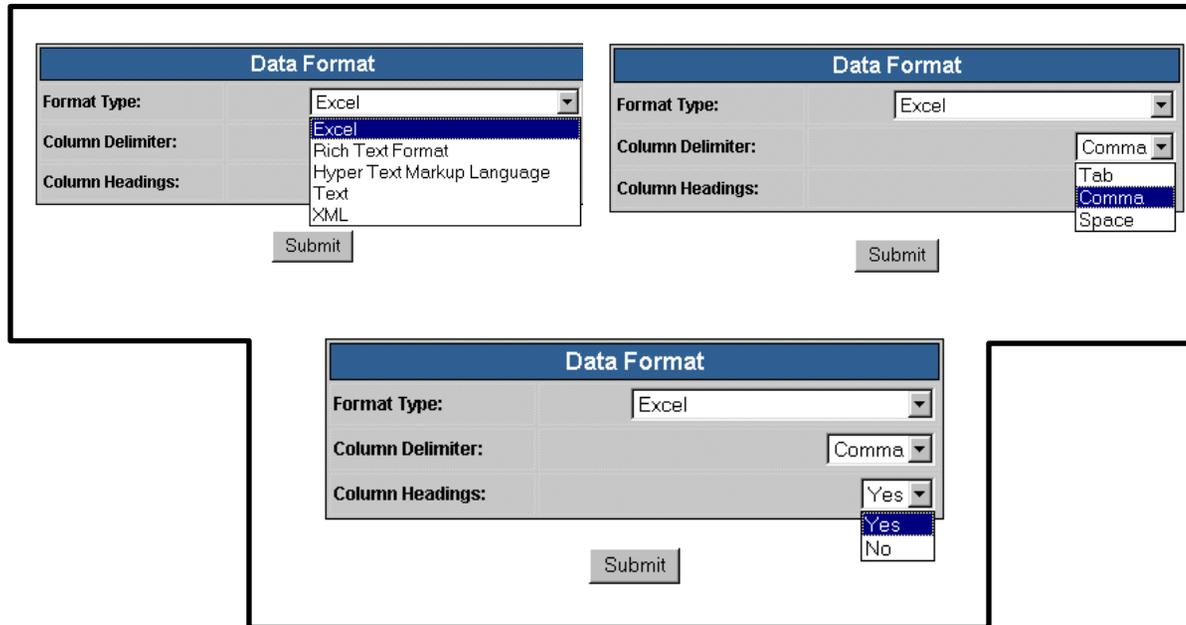
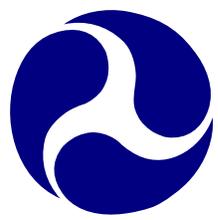


Figure 2



### Active Projects

This report provides project totals for projects that have been obligated and not closed and shows only the current amendment for that project.

|  |                     |                    |   |                       |   |
|--|---------------------|--------------------|---|-----------------------|---|
| <input type="button" value="SELECT NONE"/> |                     | <b>Data Fields</b> | <input type="button" value="SELECT ALL"/> |                       |   |
| 1.   | Cost Center         | ▼                  | 2.  | Recipient ID          | ▼ |
| 3.   | Recipient Name      | ▼                  | 4.  | Project ID            | ▼ |
| 5.   | Obligation Date     | ▼                  | 6.  | Brief Description     | ▼ |
| 7.   | Disbursement        | ▼                  | 8.  | Auth Disbursement     | ▼ |
| 9.   | Refunds             | ▼                  | 10.                                       | Previous Reservation  | ▼ |
| 11.  | Change Reservation  | ▼                  | 12.                                       | Previous Obligation   | ▼ |
| 13.  | Change Obligation   | ▼                  | 14.                                       | Previous Deobligation | ▼ |
| 15.  | Change Deobligation | ▼                  |   |                       |   |

|                                   |   |
|-----------------------------------|---|
| <b>Additional Search Criteria</b> |   |
| Recipient ID:                     | <input type="button" value="Not Selected"/> ▼ |
| Cost Center:                      | <input type="button" value="Not Selected"/> ▼ |
| Project Number:                   | <input type="text"/>                          |

|                    |  |
|--------------------|--|
| <b>Data Format</b> |  |
| Format Type:       | <input type="button" value="Excel"/> ▼ |
| Column Delimiter:  | <input type="button" value="Comma"/> ▼ |
| Column Headings:   | <input type="button" value="Yes"/> ▼   |

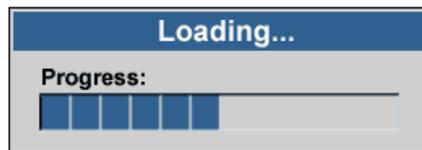
Figure 3



## Opening a Report

1. Clicking the submit button will start the query.
2. Once when the data is retrieved you will receive a link that will allow you to open a report containing your query results.
3. Click on the link in order to view the report within the TEAM-Web window (see Figure 4)

### Active Projects Report



Report Submission Time: 9/28/2001 2:35:01 PM  
 Setting up Reporting environment  
 Total Steps in Report Process = 1  
 Processing Step #1  
 Writing report to web accessible location

### Active Projects Report

Report Submission Time: 9/28/2001 2:35:01 PM  
 Setting up Reporting environment  
 Total Steps in Report Process = 1  
 Processing Step #1  
 Writing report to web accessible location  
 Report creation finished: 9/28/2001 2:35:14 PM

You can retrieve your report by clicking on the link below

[Active Projects Report](#)



TEAM Web Version 1.0 - Microsoft Internet Explorer

|    | A        | B          | C                      | D          | E        | F           | G        | H          | I       | J          | K         |
|----|----------|------------|------------------------|------------|----------|-------------|----------|------------|---------|------------|-----------|
| 1  | cost_ctr | grantee_id | grantee_no             | project_id | obl_date | brf_desc    | disburse | auth_disbu | refunds | prev_reser | change_re |
| 2  | 62000    | 1237       | GREATEROH-26-7013-00   |            | 9/8/95   | Bus Rapid   | 0        | 0          | 0       | 0          | 0         |
| 3  | 62000    | 2200       | DEPT. OF DC-06-007     |            |          | ADDITION    | 7869973  | 9014981    | 40000   | 8009693    | 635000    |
| 4  | 62000    | 5523       | BUSINESSVA-90-003      |            |          | Increase T  | 1355227  | 1481833    | 0       | 1276309    | 205524    |
| 5  | 62000    | 5658       | Q SYSTEMVA-90-700      |            |          | MOD 4       | 1467641  | 1532158    | 0       | 1272158    | 260000    |
| 6  | 62000    | 5713       | LEON SNE MD-90-002     |            |          | Increase T  | 1322869  | 1565006    | 0       | 1341919    | 223087    |
| 7  | 62000    | 5713       | LEON SNE MD-90-3006-02 |            |          | Increase fc | 132123.9 | 139315     | 0       | 319315     | 133686    |
| 8  | 62000    | 5714       | HARRIS C MA-90-005     |            |          | TASK ORI    | 1462620  | 2040156    | 0       | 1162010    | 353146    |
| 9  | 62000    | 5930       | ACTIONETDC-26-7202-00  |            |          | New Start   | 0        | 0          | 0       | 0          | 0         |
| 10 | 62000    | 6077       | MAGLEV FL-26-702       |            |          | Maglev 200  | 0        | 0          | 0       | 0          | 1000000   |
| 11 | 62000    | 9999       | TO BE SE IT-90-2001-00 |            |          | PROCURE     | 0        | 0          | 0       | 0          | 0         |
| 12 | 63000    | 5908       | U.S. DEP ID-26-3001    |            |          | Yellowstor  | 0        | 100000     | 0       | 0          | 100000    |
| 13 | 64000    | 2201       | FEDERAL DC-26-400      |            | 9/29/98  | TEA-21 OI   | 0        | 2000       | 0       | 0          | 2000      |

Figure 4

4. The user may desire to save the report and have the ability to more easily modify the report as well as print it out.
5. To do this, right click on the link and a drop down window will appear (see Figure 5).
6. Click on "Open in New Window"
7. A new window will open displaying only the report and the tool bar can be used to save and/or print the report.



# Active Projects Report

Report Submission Time: 9/28/2001 2:46:38 PM  
 Setting up Reporting environment  
 Total Steps in Report Process = 1  
 Processing Step #1  
 Writing report to web accessible location  
 Report creation finished: 9/28/2001 2:46:49 PM

You can retrieve your report by clicking on the link below

[Active Projects Report](#)

- Open
- Open in New Window**
- Save Target As...
- Print Target

---

- Cut
- Copy
- Copy Shortcut
- Paste

---

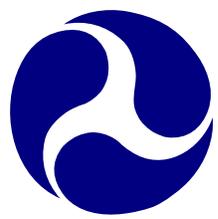
- Add to Favorites...

---

- Properties

| A1 | cost_ctr |            |              |               |           |             |          |            |          |            |           |         |
|----|----------|------------|--------------|---------------|-----------|-------------|----------|------------|----------|------------|-----------|---------|
|    | A        | B          | C            | D             | E         | F           | G        | H          | I        | J          | K         | L       |
| 1  | cost_ctr | grantee_id | grantee_name | project_id    | obl_date  | brf_desc    | disburse | auth_disbu | refunds  | prev_reser | change_re | prev_ot |
| 2  | 65000    | 2243       | BOOZ, AL     | VA-03-500     | 9/18/2006 | Commuter    | 42638.58 | 249980     | 0        | 0          | 249980    |         |
| 3  | 65000    | 2243       | BOOZ, AL     | VA-40-500     | 1/29/2004 | Security pl | 3230437  | 3192413    | 38023.72 | 2942413    | 250000    | 2942    |
| 4  | 65000    | 2243       | BOOZ, AL     | VA-90-500     | 7/14/2003 | Additional  | 2030652  | 2038977    | 0        | 2038977    | 0         | 2038    |
| 5  | 65000    | 5523       | BUSINES      | VA-90-500     | 2/22/2007 | Oversight f | 703836   | 1540768    | 0        | 1194064    | 2566      | 1194    |
| 6  | 65000    | 5596       | TICHENOF     | VA-90-500     | 8/9/1995  | 1 TASK A    | 580080.6 | 535072.3   | 45008.27 | 556537     | 23668     | 556     |
| 7  | 65000    | 5716       | VERIDIAN     | VA-50-500     | 5/25/2004 | NTD FP- C   | 498199   | 498199     | 0        | 0          | 498199    |         |
| 8  | 65000    | 5716       | VERIDIAN     | VA-90-900     | 9/30/1997 | CLOSE OI    | 3568555  | 3568643    | 1171.8   | 3568643    | 0         | 3568    |
| 9  | 65000    | 5930       | ACTIONET     | VA-90-500     | 2/1/2007  | Oversight   | 637929.4 | 762201     | 47433    | 638478     | 123723    | 638     |
| 10 | 65000    | 5930       | ACTIONET     | VA-90-501     | 9/22/2006 | Fast Track  | 117731.4 | 176597     | 0        | 0          | 176597    |         |
| 11 | 65000    | 6103       | CAPITOL      | VA-40-500     | 6/2/2003  | Support fo  | 215963   | 215963     | 0        | 201000     | 14963     | 201     |
| 12 | 65000    | 6157       | TRIUMPH      | VA-90-500     | 2/16/2005 | Procureme   | 391968.3 | 778215     | 0        | 463913     | 14302     | 463     |
| 13 | 65000    | 6158       | ADVANCE      | VA-27-501     | 3/23/2007 | STATE MA    | 0        | 786851     | 0        | 0          | 786851    |         |
| 14 | 65000    | 6158       | ADVANCE      | VA-90-500     | 8/31/2005 | STATE MA    | 2502528  | 2502569    | 0        | 1802908    | 699661    | 1802    |
| 15 | 65000    | 6323       | AECOM C      | VA-50-500     | 8/21/2002 | NTD Rev. f  | 645000   | 699000     | 0        | 699000     | 0         | 699     |
| 16 | 65000    | 6517       | MAN-MAC      | VA-27-501     | 3/3/2007  | State Safe  | 846394.2 | 1349973    | 0        | 914627     | 435346    | 914     |
| 17 | 65000    | 6517       | MAN-MAC      | VA-40-5003-00 |           | Safety and  | 0        | 0          | 0        | 0          | 0         |         |
| 18 | 65000    | 6517       | MAN-MAC      | VA-90-500     | 9/19/2005 | State Safe  | 868132.7 | 898942     | 0        | 0          | 898942    |         |
| 19 | 65000    | 6589       | BOYD, C      | VA-90-0033-00 |           | Bus Safety  | 0        | 0          | 0        | 0          | 0         |         |
| 20 | 65000    | 6589       | BOYD, C      | VA-90-501     | 5/9/2006  | Bus Safety  | 374505.8 | 846360     | 0        | 0          | 846360    |         |
| 21 | 65000    | 6589       | BOYD, C      | VA-90-5012-00 |           | Bus Safety  | 0        | 0          | 0        | 0          | 0         |         |
| 22 | 65000    | 6593       | DELTA RE     | VA-26-200     | 5/24/2006 | Copy - Edi  | 28349.88 | 35000      | 0        | 0          | 35000     |         |
| 23 | 65000    | 6606       | AUTOMAT      | VA-37-500     | 6/22/2006 | F Y 2005    | 204293.8 | 286442     | 0        | 0          | 286442    |         |

Figure 5



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