

# **OFFICE OF THE CONTROLLER**

## **Using the Finance Intranet: Financial Reports**

**March 2026**



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# Introduction to the HUB



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# What is the HUB?

- An internal reporting site that houses various reporting tools and resources used to research financial transactions and retrieve account balances.
- The two main sections are:
  - Financial Reports (Finance Intranet)
  - Payroll Reports (HCM Distribution) – Training **March 10<sup>th</sup>**
- Use this URL to access the HUB: [financeintranet.sc.edu](http://financeintranet.sc.edu)
- You can also access other important sites from this page:
  - Student and Tuition Reports (Banner and DataWarehouse)
  - Analytics (CarolinaAnalytics)
  - PeopleSoft HCM and PeopleSoft Finance
  - USCeRA
  - Controller's Office Webpage



# The HUB

UNIVERSITY OF South Carolina

HUB -

Sign out

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/01/2023 02:29  
PERKINTD - V58683307

<b>Athletic Reports</b> 	<b>Payroll Reports</b> 	<b>Financial Reports</b> 	<b>Student and Tuition Reports</b> 
<b>Analytics</b> 	<b>Faculty Reports</b> 	<b>Facilities Reports</b> 	<b>Legacy Reports</b> 
<b>Controller's Office</b> 	<b>System</b> 		

# Financial Reports



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# Financial Reports

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HUB -

Sign out



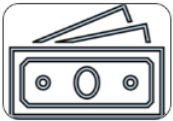
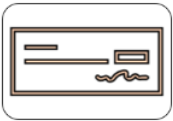

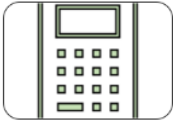
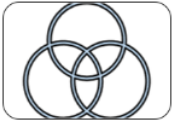
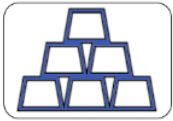


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<p>Athletic Reports</p>	<p>Payroll Reports</p>	<p>Financial Reports</p>	<p>Student and Tuition Reports</p>
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<p>Controller's Office</p>	<p>System</p>		

# Financial Reports

HUB - Finance Intranet - 

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PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
<p><b>Fund Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>Non-USCSP Project Dashboard</b></p>  <p>Provides a listing of available cash balances, outstanding encumbrances and project end dates for a quick view at project statuses.</p>	<p><b>GL Yearly Comparison</b></p>  <p>GL Summary report with yearly comparisons for 2-5 years.</p>	<p><b>Budget Office</b></p>  <p>Budget to Actual with Prior Year.</p>
<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Notice you can also find links to:
  - PeopleSoft Finance
  - USCeRA



# What are Financial Reports?

Financial Reports provides access several reporting tools. We will go over the following today:

- **GL Dashboard:** Provides current and available balance using budget to actual comparison and detailed monthly statement of Accounting transactions.
- **GL Summary:** Provides a more advanced reporting view to allow users to filter, group and burst summary data.
- **GL Activity:** Provides the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level.
- **GL Yearly Comparison:** Provides a comparison by account for 2 to 5 fiscal years.



# Financial Reports Continued

- **Grant Dashboard:** Designed specifically for sponsored award (USCSP) grant projects. Provides the ability to view expenses and cost share.
  - Summary View
  - Detail View
- **Non-USCSP Project Dashboard:** Provides the ability to easily see cash balances and end dates for internal projects (USCIP), spendable endowments (USCEN), and student activity (USCSA) projects all in one report with drill downs into GL Summary and GL Activity.
- **Fund Dashboard:** Provides a listing of available cash balances and outstanding encumbrances by individual fund (non-A Fund).



# Who can use this tool?

- Business Managers
- Budget Officers
- Grant Administrators
- Faculty Members
- Principal Investigators (PIs)
- HR Contacts



# Requesting Access



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## PeopleSoft Finance Access Form

Complete this form and have it signed by your supervisor.  
Email completed form to [pssecure@mailbox.sc.edu](mailto:pssecure@mailbox.sc.edu).

### Employee/Affiliate Contact Information

First and Last Name:	
Email:	
Network ID/ Login ID:	
USCID/ Employee ID:	
Department Name:	
Campus/Operating Unit:	
Location: Building/ Room #	

Request updates to the employee's PeopleSoft Finance access based on the person's job responsibilities.

**Note:** Roles that include checkboxes are assigned by the security team, while those without checkboxes are managed by other areas. Contact details and links to the relevant forms are provided.

### Inquire Only and Operational Reporting Access

**Finance Intranet Only:** Access to review and download operational reporting information on the Finance Intranet. Includes inquiry only access to PeopleSoft financial transactions. This access is automatically included with all access listed below.

- Users will have access to the same departments/projects as they have in Finance PeopleSoft. To request access, complete the [Finance Access Form](#).
- Request Financial User Role under **Inquire Only and Operational Reporting Access**.
- Submit request to [PSSecure@mailbox.sc.edu](mailto:PSSecure@mailbox.sc.edu).



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# Helpful Tip #1

- Drill down capability will require you to log into PeopleSoft Finance to view specific transactions.
- Ensure you are not using PeopleSoft HCM in the same browser as this will prevent your ability to log into PeopleSoft Finance. These systems cannot be viewed simultaneously in the same browser. You will receive the following error message:
  - ✓ *“STR\_PCMINVPORTAL: Invalid portal name EMPLOYEE in request. Portal not defined. Unable to process request with an invalid portal.”*
- If you need to use both HCM and Finance, we recommend using **different** browsers for each system.



# Helpful Tip #2

- Intranet reports have a CSV button so that the data can be exported to Excel.
- Intranet reports can also be copied and pasted into Excel.
- All Intranet reports have a floating column header so that the column titles can be seen throughout the report.

**NOTE:** If you want to **print** an Intranet report, make sure that you have scrolled all the way up to the top of the Intranet report before printing.




# Financial Reports: GL Dashboard



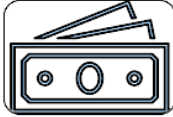
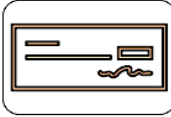

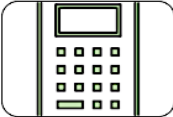
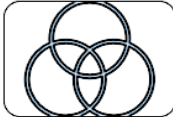
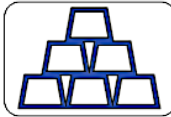




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# Financial Reports: GL Dashboard

HUB - Finance Intranet - 

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- Select Financial Reports, then GL Dashboard.



# GL Dashboard – Search Options

Operating Unit	Department	Fund
<a href="#">74 Multiple Matching Operating Units</a>	<a href="#">2748 Multiple Matching Departments</a>	<a href="#">13</a>
<b>2 Multiple Matching Products (Terms)</b>		
<a href="#">14505 Multiple Matching Projects - Activities</a>	<a href="#">864 Multiple Matching PIs</a>	

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**Operating Unit**

- AK000 - AIKEN
- BF000 - BEAUFORT
- CL000 - GENERAL FUND
- CL001 - PRESIDENT
- CL002 - PROVOST
- CL003 - ATHLETICS
- CL004 - ADMINISTRATION AND FINANCE
- CL005 - EQUAL OPPORTUNITY PROGRAMS
- CL006 - LEGAL AFFAIRS
- CL007 - OIPEE
- CL008 - STUDENT AFFAIRS
- CL009 - BOARD OF TRUSTEES
- CL010 - FINANCE
- CL011 - LAW ENFORCEMENT & SAFETY
- CL012 - BUSINESS AFFAIRS

[Matching Classes](#)

[Multiple Matching Awards](#)

- If unsure where to start, click the available links to select from a list of options.
- Select the **Operating Unit** is a great place to start.

# GL Dashboard – Search Criteria

Provides current and available balance using budget actual comparison and detailed monthly statement of transactions.

The screenshot shows the 'GL DASHBOARD' search criteria form. The form is titled 'UNIVERSITY OF SOUTH CAROLINA' and 'GL DASHBOARD'. It includes a 'Sign out' link in the top right corner. The form is divided into several sections: 'Department' (with a red box around the input field containing '155001'), 'Fund' (with a red box around the input field containing 'A0001'), 'USCID' (with an empty input field), 'Project' (with an empty input field), 'Activity' (with an empty input field), 'Project Reference' (with an empty input field), 'Class' (with an empty input field), 'Product (Term)' (with an empty input field), 'Statement' (with a dropdown menu showing 'Direct Expenses'), 'Fiscal Period' (with a red box around the dropdown menu showing 'GL 2122 008-February'), and a checkbox for 'Display Account Chartfield' which is checked. At the bottom of the form are three buttons: 'Submit', 'Clear', and 'CSV'.

## Search By:

- Department, Fund, or Project
- Select an actual period or month vs. “current open” period
- Select **Display Account Chartfield** to drill down into the Categories to see related accounts.

# GL Dashboard – Review Approvers

Operating Unit	Department	Fund	Class
CL040 ENGINEERING - COMPUTING	155001 COLL ENGR & COMPTNG OPERATING	A0001 UNRESTRICTED OPERATING FUND 1-CURRENT UNRESTRICTED	101 GENERAL ACADEMIC INSTRUCTION

DEPARTMENT APPROVERS			
Role	Name	USCID	Email
APPRV_1	Kay Dorrell		<a href="mailto:dorrellk@cec.sc.edu">dorrellk@cec.sc.edu</a>
APPRV_1	Shannon Lackey		<a href="mailto:svlackey@cec.sc.edu">svlackey@cec.sc.edu</a>
APPRV_2	Alicia Stoll Williams		<a href="mailto:alstoll@cec.sc.edu">alstoll@cec.sc.edu</a>

- This example is showing a list of approvers for Department 155001/A0001 (Dept/Fund search).
- When searching by Project, the Project Team information will become available.



# GL Dashboard – Data Review

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE	PRE ENC.	ENC.	AVAILABLE BALANCE
TOTAL REVENUE	(132,910.00)		(132,910.00)			(132,910.00)
81100 TRF FR E&G UCF (ADER)	504,323.00	5,582.00	498,741.00			498,741.00
NON-MANDATORY TRSF FROM UCF-E&G	504,323.00	5,582.00	498,741.00			498,741.00
SUBTOTAL NON-MANDATORY TRSF FROM UCF-E&G	504,323.00	5,582.00	498,741.00			498,741.00
TOTAL TRANSFER IN	504,323.00	5,582.00	498,741.00			498,741.00
TOTAL RESOURCE	27,185,493.00	32,936,342.20	(5,750,849.20)			(5,750,849.20)

## The GL Dashboard provides:

- Budgeted Resources vs. Actual Resources
- Categories / Subtotals of Revenues



# GL Dashboard – Data Review

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE	PRE ENC.	ENC.	AVAILABLE BALANCE
<b>TOTAL DIRECT EXPENSE</b>	27,185,493.00	19,037,997.48	8,147,495.52			8,147,495.52
86100 TRF TO E&G UCF (ADER)		5,582.00	(5,582.00)			(5,582.00)
86101 TRF TO DEPT N FUNDS		50,000.00	(50,000.00)			(50,000.00)
NON-MANDATORY TRSF TO UCF-E&G		55,582.00	(55,582.00)			(55,582.00)
SUBTOTAL NON-MANDATORY TRSF TO UCF-E&G		55,582.00	(55,582.00)			(55,582.00)
TOTAL TRANSFER OUT		55,582.00	(55,582.00)			(55,582.00)
<b>TOTAL USE</b>	27,185,493.00	19,093,579.48	8,091,913.52			8,091,913.52

## The GL Dashboard provides:

- Budgeted Uses vs. Actual Uses
- Subtotals by expense category
- Ability to see specific accounts in each category
- Drill down capability



# GL Dashboard – Drill Down

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE
FACULTY, DEANS, ACAD. DEPT HEAD		10,751.00	(10,751.00)
51400 NON FED WORK STUDY STUDENTS		2,999.97	(2,999.97)
OTHER		2,999.97	(2,999.97)
<b>SUBTOTAL PERSONNEL AND FRINGE BENEFITS</b>	<b>20,391,535.00</b>	<b>14,082,787.38</b>	<b>6,308,747.62</b>
51900 FRINGE BENEFITS	6,793,958.00	4,940,530.24	1,853,427.76
FRINGE BENEFITS	6,793,958.00	4,940,530.24	1,853,427.76
<b>SUBTOTAL FRINGE BENEFITS</b>	<b>6,793,958.00</b>	<b>4,940,530.24</b>	<b>1,853,427.76</b>
52070 CONTRACTUAL SERVICES		122.15	(122.15)
CONTRACTUAL SERVICES		122.15	(122.15)
<b>SUBTOTAL SERVICES</b>		<b>122.15</b>	<b>(122.15)</b>
53004 DATA PROCESSING SUPPLIES		9,076.21	(9,076.21)
DATA PROCESSING SERVICES		9,076.21	(9,076.21)
<b>SUBTOTAL DATA PROCESSING SUPPLIES AND SERVICES</b>		<b>9,076.21</b>	<b>(9,076.21)</b>
54525 GRADUATE ASSISTANT TUITION SUP		5,481.50	(5,481.50)
SCHOLARSHIPS AND FELLOWSHIPS		5,481.50	(5,481.50)
<b>SUBTOTAL SCHOLARSHIPS AND FELLOWSHIPS</b>		<b>5,481.50</b>	<b>(5,481.50)</b>
<b>TOTAL DIRECT EXPENSE</b>	<b>27,185,493.00</b>	<b>19,037,997.48</b>	<b>8,147,495.52</b>

- You can click the active links to drill down to the activity level.



# GL Dashboard – Drill Down

GL Activity		FP <= 008 AND REGEXP_LIKE( JOURNAL_STATUS, 'PUJ' ) AND DEPARTMENT LIKE '155001%' AND FUND LIKE 'A0001%' AND a.ACCOUNT LIKE '53004%' AND ACCOUNT_FUNCTION LIKE 'USE%' AND ACCOUNT_SUBTYPE LIKE 'DIRECT EXPENSE%' AND ACCOUNT_CATEGORY LIKE 'E125%' AND ACCOUNT_SUBCATEGORY LIKE 'E25%'					
ACTUAL2122 as of 10/21/2022 03:28	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2122-6 CL040-155001-A0001-53004-101- - - - -	<a href="#">EXA0132217</a>	12/03/2021	12/03/2021	533.48	Expense Accruals	<a href="#">SHT3000097339</a>	EX
Dohan,David Carl	Dohan,David Carl					PCARD24430991314083355026219-23096411111	
2122-7 CL040-155001-A0001-53004-101- - - - -10009287	<a href="#">AP00134287</a>	01/04/2022	01/18/2022	43.36	AP Accruals	<a href="#">VO02063999</a>	AP
DELL MARKETING LP	<a href="#">PO2000060846</a>				<a href="#">CHK5000673388</a>	PAID AND CLEARED	
2122-7 CL040-155001-A0001-53004-101- - - - -10009287	<a href="#">AP00134287</a>	01/04/2022	01/18/2022	54.12	AP Accruals	<a href="#">VO02063999</a>	AP
DELL MARKETING LP	<a href="#">PO2000060846</a>				<a href="#">CHK5000673388</a>	PAID AND CLEARED	
2122-7 CL040-155001-A0001-53004-101- - - - -10009287	<a href="#">AP00134797</a>	01/25/2022	01/27/2022	8,445.25	AP Accruals	<a href="#">VO02075411</a>	AP
DELL MARKETING LP	<a href="#">PO2000060846</a>				<a href="#">CHK5000675251</a>	PAID AND CLEARED	
- TOTAL				(9,076.21)			


- Use the active links to drill down into the activity to see the specific expenses, payroll, and voucher data for that account.
- Notice how the \$9,076.21 drill down total matches the summarized total for account 53004 on the previous slide.

# GL Dashboard – Drill Down

## Expense Report Example:

ACTUAL2122 as of 10/21/2022 03:28	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2122-6 CL040-155001-A0001-53004-101- - - - -	EXA0132217	12/03/2021	12/03/2021	533.48	Expense Accruals	SHT3000097339	EX

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[All](#) |  | [Advanced Search](#)

**SC\_GM\_DASHBOARD\_EXPENSE\_DTL- Grants Dashboard Expense Dtl**

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(7 kb\)](#)

[View All](#)

Row	Expense Report	Report Description	Employee ID	Name	Expense Date	Line	Dist Line	Expense Type	Ticket Number	Distance	Merchant	Line Description	GL Unit	Oper Unit	Department	Fund	Account	Class	PC Bus Unit	Project	Activity	Cost Share	Expense Line Amt	Created On
1	3000097339	November 2021	N38462378	Dohan,David Carl	11/17/2021	1	1	OTHER SUPPLIES		0.00	ADVANCED VIDEO GROUP	DS - Directory TV	USC01	CL040	155030	A0001	53009	456					1097.280	12/02/2021
2	3000097339	November 2021	N38462378	Dohan,David Carl	10/30/2021	2	1	DATA PROCESSING SUPPLIES		0.00	DMI* DELL K-12/GOVT	SS- Laptops	USC01	CL040	155024	A0001	53004	456					1672.260	12/02/2021
3	3000097339	November 2021		Dohan,David Carl	11/10/2021	3	1	DATA PROCESSING SUPPLIES		0.00	DMI* DELL K-12/GOVT	Sumwalt - Lab Printing supplies	USC01	CL040	155001	A0001	53004	101					533.480	12/02/2021
4	3000097339	November 2021		Dohan,David Carl	10/27/2021	4	1	DATA PROCESSING SUPPLIES		0.00	NEWEGG INC	DS- Printer Toner	USC01	CL040	155030	A0001	53004	456					124.170	12/02/2021
5	3000097339	November 2021		Dohan,David Carl	11/11/2021	5	1	DATA PROCESSING SUPPLIES		0.00	NEWEGG INC	COM- Camera Equipment	USC01	CL040	155027	A0001	53004	101					37.780	12/02/2021

- Click the **Reference** to view the expense detail in Finance PeopleSoft.

# GL Dashboard – Drill Down

## Voucher Example:

2122-7	CL040-155001-A0001-53004-101- - - - -10009287	<a href="#">AP00134287</a>	01/04/2022	01/18/2022	43.36	AP Accruals	<a href="#">VO02063999</a>	AP
	DELL MARKETING LP	<a href="#">PO2000060846</a>			<a href="#">CHK5000673388</a>	PAID AND CLEARED		
2122-7	CL040-155001-A0001-53004-101- - - - -10009287	<a href="#">AP00134287</a>	01/04/2022	01/18/2022	54.12	AP Accruals	<a href="#">VO02063999</a>	AP

### Voucher Line Details

#### Voucher Details

Business Unit USC01

**Voucher ID** 02063999

Invoice No 10548021031

Invoice Dt 12/28/2021

**Supplier ID** C000001515

Name DELL MARKETING LP

Gross Amount	90.26
Misc Charges	7.22
Total VAT	0.00

Transaction Currency USD

[Attachments \(1\)](#)

[Comments\(0\)](#)

- Click the specific expense you would like to view transaction details for within the system. A **paperclip** indicates there is an attachment.



# GL Dashboard – Drill Down

## Voucher Example:

Business Unit USC01      Voucher ID 02063999

**Details**

File Name      Descr

02063999\_A-Dell\_10548021031\_-90.26.pdf

OK      Cancel      Refresh

**DELL EMC**      DELL MARKETING L.P.  
One Dell Way  
Round Rock, TX 78882

FID Number: 74-2616805  
Inquiries: www.dell.com/ordersupport/  
Dell Online: http://www.dell.com

**Invoice**

**BILL TO:**  
UNIV OF SOUTH CAROLINA  
ACCOUNT PAYABLE  
1600 HAMPTON ST  
COLUMBIA, SC 29208-3403

**SHIP TO:**  
SEE BELOW

PLEASE REVIEW DELL'S TERMS & CONDITIONS OF SALE AND POLICIES, WHICH GOVERN THIS TRANSACTION  
VIEW YOUR ORDER DETAILS ONLINE

Invoice No: 10548021031      Customer No: 114200370      Order No: SEE BELOW      Page 1 of 2

Purchase Order: USC01.2000060846      Sales Rep: BECKY MAHON  
Payment Terms: Due 30 days from the invoice date      Shipped Via: SEE BELOW  
Due Date: 01/27/2022      Invoice Date: 12/28/2021      Contract Name: Dell NASPO Computer Equipment PA - State of SC  
Waybill Number: 1ZRS5A1460313048520      Customer Agreement #: MNWNC-108/4400011358  
Order Date: 11/05/2021      Contract Code: C000000010739

Item Number	Description	Qty	Unit	Unit Price	Amount
FOR SHIPMENTS TO CALIFORNIA, A STATE ENVIRONMENTAL FEE OF UP TO \$6 PER ITEM WILL BE ADDED TO INVOICES FOR ALL ORDERS CONTAINING A DISPLAY GREATER THAN 4 INCHES. PLEASE KEEP ORIGINAL BOX FOR ALL RETURNS. COMPREHENSIVE ONLINE CUSTOMER CARE INFORMATION AND ASSISTANCE IS A CLICK AWAY AT WWW.DELL.COM/PUBLIC-ECARE TO ANSWER A VARIETY OF QUESTIONS REGARDING YOUR DELL ORDER.					

USD	
Sub-Total:	\$ 90.26
Ship. &/or Handling:	\$ 0.00
ENVIRO FEE:	\$ 0.00
Taxable:	\$ 0.00
Non-Taxable:	\$ 0.00
Invoice Total:	\$ 90.26

---

DETACH AT LINE AND RETURN WITH PAYMENT  
Invoice Number: 10548021031  
Customer Name: UNIV OF SOUTH CAROLINA  
Customer Number: 114200370  
Purchase Order: USC01.2000060846

**DELL EMC**

Make check payable / remit to :      **Electronics Payments**  
DELL MARKETING L.P.      Dell Marketing L.P.  
C/O Dell USA L.P.      PNC Bank  
PO Box 534118      ABA#: 043-000-096  
Atlanta, GA 30353-4118      Acct#: 1017304611  
Swift code : PNCCUS33

USD	
Sub-Total:	\$ 90.26
Ship. &/or Handling:	\$ 0.00
ENVIRO FEE:	\$ 0.00
Taxable:	\$ 0.00
Non-Taxable:	\$ 90.26
Invoice Total:	\$ 90.26
Balance Due:	\$ 90.26
Amount Enclosed:	

01054802103100000000902600001142003700

Help

View All

- Click the **Attachments** link to view supporting documentation.



UNIVERSITY OF  
**South Carolina**

# GL Dashboard – Drill Down

## Payroll Example:

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE
51000 SALARIES	704,651.00	(25,644.39)	730,295.39
51200 CLASSIFIED EMPLOYEES	4,552,493.00	2,402,484.03	2,150,008.97

ACTUAL2122 as of 10/21/2022 03:28	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source	
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0123964	07/10/2021	07/13/2021	146,539.90	HR Payroll Journals	>>HCM	PAY
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0123964	07/10/2021	07/13/2021	4,450.64	HR Payroll Journals	>>HCM	PAY
2122-1	CL040-155001-A0001-51200-101- - - - -	REV0124260	07/01/2021	07/16/2021	(92.04)	FY21 accrue hrlly		ONL
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0125017	07/29/2021	07/30/2021	191.75	HR Payroll Journals	>>HCM	PAY
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0125017	07/29/2021	07/30/2021	155,921.17	HR Payroll Journals	>>HCM	PAY
2122-2	CL040-155001-A0001-51200-101- - - - -	PAY0125851	08/11/2021	08/13/2021	4,527.34	HR Payroll Journals	>>HCM	PAY

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %
		2122-1 : PAY0123964	AH10	155201	C12	07/15/2021	8000709347	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,865.42	100.00%
		2122-1 : PAY0123964	AM68	155020	C12	07/15/2021	8000709285	07/15/2021	A00000001702	CL040-155001-A0001-101--	3,536.13	100.00%
		2122-1 : PAY0123964	AH10	155201	C12	07/15/2021	8000709348	07/15/2021	A00000001702	CL040-155001-A0001-101--	2,248.88	100.00%
		2122-1 : PAY0123964	AH10	155901	C12	07/15/2021	8000709382	07/15/2021	A00000001702	CL040-155001-A0001-101--	2,229.71	100.00%
		2122-1 : PAY0123964	AH10	155301	C12	07/15/2021	8000709352	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,716.54	100.00%
		2122-1 : PAY0123964	AH10	155602	C12	07/15/2021	8000709377	07/15/2021	A00000001702	CL040-155001-A0001-101--	2,087.71	100.00%
		2122-1 : PAY0123964	AH10	155020	P12	07/15/2021	8000715574	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,622.92	100.00%
		2122-1 : PAY0123964	AD20	155020	C12	07/15/2021	8000709286	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,766.88	100.00%
		2122-1 : PAY0123964	AH10	155020	C12	07/15/2021	8000709287	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,851.35	100.00%

- Click the specific expense you would like to view transaction details for within the system. A paperclip indicates there is an attachment.





# Demonstration

- Using the GL Dashboard



# GL Dashboard Key Take-Aways

- Detailed report with built-in subtotals and also transaction activity at the bottom.
- **Fiscal Period** always defaults to current period.
- Use the **Display Account Chartfield** checkbox to view account information.
- Remember, you can drill down into any of the expenses including payroll and budget transactions!
- Recommended to use the Grant Dashboard when reviewing sponsored award projects (USCSP).




# Financial Reports: GL Summary



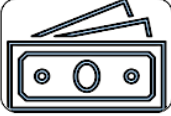
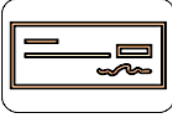

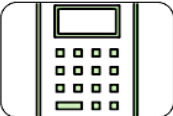
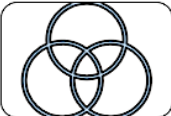
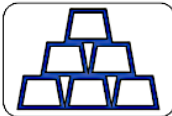




UNIVERSITY OF  
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# Finance Reports - GL Summary

HUB - Finance Intranet - 

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/01/2023 02:29  
PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
<p><b>Fund Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>Non-USCSP Project Dashboard</b></p>  <p>Provides a listing of available cash balances, outstanding encumbrances and project end dates for a quick view at project statuses.</p>	<p><b>GL Yearly Comparison</b></p>  <p>GL Summary report with yearly comparisons for 2-5 years.</p>	<p><b>Budget Office</b></p>  <p>Budget to Actual with Prior Year.</p>
<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Select Financial Reports, then GL Summary.



# GL Summary – Search Criteria

Provides a more advanced reporting view to allow users to filter, group, and burst summary data.

<b>Operating Unit</b> <input type="text"/>	<b>Product (Term)</b> <input type="text"/>	<b>Total 1</b> Department <input type="text"/>
<b>Department *</b> 135500, 462276	<b>Project BU</b> <input type="text"/>	<b>Total 2</b> None <input type="text"/>
<b>Fund</b> <input type="text"/>	<b>Project *</b> <input type="text"/>	<b>Total 3</b> Fund <input type="text"/>
<b>Fund Group</b> <input type="text"/>	<b>CFDA</b> <input type="text"/>	<b>Total 4</b> None <input type="text"/>
<b>Attribute</b> All <input type="text"/>	<b>Contract</b> <input type="text"/>	<b>Total 5</b> Account Type <input type="text"/>
<b>Class</b> <input type="text"/>	<b>Sponsor</b> <input type="text"/>	<b>Total 6</b> None <input type="text"/>
<b>Account</b> <input type="text"/>	<input type="checkbox"/> Show BUD000	<b>Total 7</b> Account <input type="text"/>
<b>Account Type</b> <input type="text"/>	<small>* Search for multiple values by inserting a comma in between each value.</small>	<b>Burst</b> Total 1 <input type="text"/>
<b>Account Category</b> <input type="text"/>		<b>Fiscal Period</b> GL 2223 002-August <input type="text"/>
<b>Account Subcategory</b> <input type="text"/>		
<b>Account Tree</b> <input type="text"/>		

## Report Criteria:

- Search by Operating Unit, Fund, Account, or Project.
- Determine subtotals and burst
- Select a Fiscal Period.
- Use a comma to search for multiple departments\* or projects\* at the same time



# GL Summary – Burst and Total Options

Total 1	Department	▼
Total 2	Account	▼
Total 3	Fund	▼
Total 4	None	▼
Total 5	Account Type	▼
Total 6	None	▼
Total 7	Account	▼
Burst	Total 2	▼
Fiscal Period	GL 2223 001-July	▼

The **total** options will provide subtotals for each of the chartfields selected.

- The order of the totals chosen is important because it make the report easier/harder to read.

The **burst** option essentially splits the results into separate reports with column headers by the option chosen.

# GL Summary – Data Review

Operating Unit	Product (Term)	Total 1
<input type="text"/>	<input type="text"/>	Department <input type="text" value="Department"/>
Department *	Project BU	Total 2
<input type="text" value="290000"/>	<input type="text"/>	None <input type="text" value="None"/>
Fund	Project *	Total 3
<input type="text" value="E0334"/>	<input type="text"/>	Fund <input type="text" value="Fund"/>
Fund Group	CFDA	Total 4
<input type="text"/>	<input type="text"/>	None <input type="text" value="None"/>
Attribute	Contract	Total 5
All <input type="text" value="All"/>	<input type="text"/>	Account Type <input type="text" value="Account Type"/>
Class	Sponsor	Total 6
<input type="text"/>	<input type="text"/>	None <input type="text" value="None"/>
Account	<input type="checkbox"/> Show BUD000	Total 7
<input type="text"/>		Account <input type="text" value="Account"/>
Account Type	* Search for multiple values by inserting a comma in between each value.	Burst
<input type="text"/>		Total 1 <input type="text" value="Total 1"/>
Account Category		Fiscal Period
<input type="text"/>		GL 2223 002-August <input type="text" value="GL 2223 002-August"/>
Account Subcategory		
<input type="text"/>		
Account Tree		
<input type="text"/>		
<input type="button" value="Submit"/> <input type="button" value="Clear"/> <input type="button" value="CSV"/>		

## Search by:

- In this example, we search **E0334** by department 290000 for fiscal 2223 002-August.



# GL Summary – Data Review

GL Summary							
DEPARTMENT LIKE '290000%' AND FUND LIKE 'E0334%' AND substr('000'    a.FP, -3,3) <= '002'							
GL 2223 002-August as of 10/14/2022 03:45	Actual Open Balance	Life to Date Budget	Current Month Actual	Fiscal Year Actual	Life to Date Actual	Pre Enc.	Enc.
32000 ALLOCATED FUND BALANCES	15,380.00				15,380.00		
3 FUND BALANCE	15,380.00				15,380.00		
40410 CONFERENCE REGISTRATION REVENU				150.00	150.00		
4 REVENUE				150.00	150.00		
52070 CONTRACTUAL SERVICES				185.00	185.00		
53031 COMP SOFTWARE UNDER \$100,000				75.00	75.00		
5 DIRECT EXPENSE				280.00	280.00		
E0334 ETHICS NONCREDIT COURSE	15,380.00			(110.00)	15,250.00		
290000 CONTINUING EDUCATION	15,380.00			(110.00)	15,250.00		

Remember, when entering department in Intranet (or query) search criteria, you will not see the cash balance because departments are not balancing chartfields. If trying to manage A Fund balance, you can search by department.



# GL Summary – Data Review

<b>Operating Unit</b> <input type="text"/>	<b>Product (Term)</b> <input type="text"/>	<b>Total 1</b> Department <input type="text"/>
<b>Department *</b> <input type="text"/>	<b>Project BU</b> <input type="text"/>	<b>Total 2</b> None <input type="text"/>
<b>Fund</b> E0334	<b>Project *</b> <input type="text"/>	<b>Total 3</b> Fund <input type="text"/>
<b>Fund Group</b> <input type="text"/>	<b>CFDA</b> <input type="text"/>	<b>Total 4</b> None <input type="text"/>
<b>Attribute</b> All <input type="text"/>	<b>Contract</b> <input type="text"/>	<b>Total 5</b> Account Type <input type="text"/>
<b>Class</b> <input type="text"/>	<b>Sponsor</b> <input type="text"/>	<b>Total 6</b> None <input type="text"/>
<b>Account</b> <input type="text"/>	<input type="checkbox"/> Show BUD000	<b>Total 7</b> Account <input type="text"/>
<b>Account Type</b> <input type="text"/>	* Search for multiple values by inserting a comma in between each value.	<b>Burst</b> Total 1 <input type="text"/>
<b>Account Category</b> <input type="text"/>		<b>Fiscal Period</b> GL 2223 002-August <input type="text"/>
<b>Account Subcategory</b> <input type="text"/>		
<b>Account Tree</b> <input type="text"/>		

## Search by:

- If looking for an E Fund report, search by E Fund only to view the entire trial balance for the fund. It's important to see the whole picture.



# GL Summary – Data Review

GL Summary							
FUND LIKE 'E0334%' AND substr('000'    a.FP, -3,3) <= '002'							
GL 2223 002-August as of 10/14/2022 03:45	Actual Open Balance	Life to Date Budget	Current Month Actual	Fiscal Year Actual	Life to Date Actual	Pre Enc.	Enc.
10300 DUE TO/DUE FROM CLAIM ON CASH	15,380.00			(110.00)	15,250.00		
1 ASSET	15,380.00			(110.00)	15,250.00		
E0334 ETHICS NONCREDIT COURSE							
000000 ALL DEPARTMENTS							
GL Summary							
FUND LIKE 'E0334%' AND substr('000'    a.FP, -3,3) <= '002'							
GL 2223 002-August as of 10/14/2022 03:45	Actual Open Balance	Life to Date Budget	Current Month Actual	Fiscal Year Actual	Life to Date Actual	Pre Enc.	Enc.
32000 ALLOCATED FUND BALANCES	15,380.00				15,380.00		
3 FUND BALANCE	15,380.00				15,380.00		
40410 CONFERENCE REGISTRATION REVENUE				150.00	150.00		
4 REVENUE				150.00	150.00		
52070 CONTRACTUAL SERVICES				185.00	185.00		
53031 COMP SOFTWARE UNDER \$100,000				75.00	75.00		
5 DIRECT EXPENSE				260.00	260.00		
E0334 ETHICS NONCREDIT COURSE	15,380.00			(110.00)	15,250.00		
290000 CONTINUING EDUCATION	15,380.00			(110.00)	15,250.00		

- Searching by E Fund only, returned the cash balance indicated by the 10300 row. Notice how the cash is coded to department 000000.

**Note:** In order to see the cash included with the other accounts, change your Total 1 to Fund and Total 2 to none.





# Demonstration

- Using the GL Summary



# GL Summary Key Take-Aways

- Use the **Display Account Chartfield** checkbox to view all account information.
- The Total and Burst functions allow for expanded report options and views.
- For A Funds, life-to-date expenses equal **fiscal** year-to-date.
- Use a wildcard (%), to pull in additional search values.
- You can drill down into any of the expenses including payroll.
- Use the Grant Dashboard when reviewing USCSP projects.




# Financial Reports: GL Activity

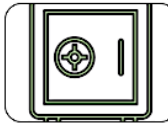

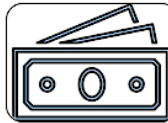
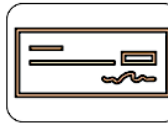
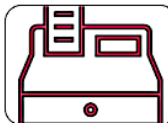
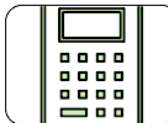
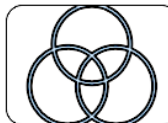
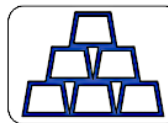




UNIVERSITY OF  
**South Carolina**

# Finance Reports - GL Activity

HUB - Finance Intranet - 

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/01/2023 02:29  
PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
<p><b>Fund Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>Non-USCSP Project Dashboard</b></p>  <p>Provides a listing of available cash balances, outstanding encumbrances and project end dates for a quick view at project statuses.</p>	<p><b>GL Yearly Comparison</b></p>  <p>GL Summary report with yearly comparisons for 2-5 years.</p>	<p><b>Budget Office</b></p>  <p>Budget to Actual with Prior Year.</p>
<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Select Financial Reports, then GL Activity.



# GL Activity – Search Criteria

<b>Journal ID</b> <input type="text"/>	<b>Operating Unit</b> <input type="text"/>	<b>Product</b> <input type="text"/>	<b>Total 1</b> Department <input type="text"/>
<b>Journal Date (m/d/y)</b> // <input type="text"/> to // <input type="text"/>	<b>Department</b> <input type="text"/>	<b>Project BU</b> <input type="text"/>	<b>Total 2</b> None <input type="text"/>
<b>Post Date (m/d/y)</b> // <input type="text"/> to // <input type="text"/>	<b>Fund</b> <input type="text"/>	<b>Project</b> <input type="text"/>	<b>Total 3</b> Fund <input type="text"/>
<b>Line Description</b> <input type="text"/>	<b>Fund Group</b> <input type="text"/>	<b>CFDA</b> <input type="text"/>	<b>Total 4</b> None <input type="text"/>
<b>Line Reference</b> <input type="text"/>	<b>Class</b> <input type="text"/>	<b>Contract</b> <input type="text"/>	<b>Total 5</b> Account Type <input type="text"/>
<b>Line Reference Name</b> <input type="text"/>	<b>Account</b> <input type="text"/>	<b>Sponsor</b> <input type="text"/>	<b>Total 6</b> None <input type="text"/>
<b>Line Amount</b> <input type="text"/> to <input type="text"/>	<b>Account Type</b> <input type="text"/>	<b>Costshare</b> <input type="text"/>	<b>Total 7</b> Account <input type="text"/>
<b>Journal Source</b> <input type="text"/>	<b>Account Category</b> <input type="text"/>	<b>Invoice Tree</b> <input type="text"/>	<b>Burst</b> Total 1 <input type="text"/>
<b>Journal Status</b> --On Ledger-- <input type="text"/>	<b>Account Subcategory</b> <input type="text"/>	<b>Athletic Tree</b> <input type="text"/>	<b>Detail</b> Yes <input type="text"/>
<b>Measure</b> ACTUAL LTD <input type="text"/>	<b>Account Tree</b> <input type="text"/>	<input type="checkbox"/> Show BUD000	<b>Sort</b> Post Date <input type="text"/>
<b>PS Suppliers</b> <input type="text"/>	<b>Account Subtype</b> <input type="text"/>		<b>Fiscal Period</b> GL Current [OPEN] <input type="text"/>
	<input checked="" type="checkbox"/> Show Additional Reference Info		
	<input type="button" value="Submit"/>	<input type="button" value="Clear"/>	<input type="button" value="CSV"/>

- Provides the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level.
- Recommend using **Journal Date** when pulling transactions for one or more fiscal period.



# GL Activity – Search Criteria

## Measure vs. Fiscal Period

- Match the measure to the fiscal period you're looking for.
- For example, if you just want September expenses, change your measure to Actual MTD. The month-to-date measure will filter out the opening balance lines.
- LTD – Life to Date
- YTD – Year to Date



# GL Activity – Drill down

GL Activity								
FP <= 001 AND FP > 0 AND REGEXP_LIKE( JOURNAL_STATUS, '[PU]' ) AND OPERATING_UNIT LIKE 'LA000%' AND a.ACCOUNT LIKE '52024%'								
ACTUAL2223 as of 10/14/2022 03:59								
	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source	
2223-1	LA000-942203-D0200-52024-502- - - - -	EXA0146874	07/28/2022	07/28/2022	250.00	Expense Accruals	SHT3000117865	EX
	Calhoun,Nicholas				ACH8000161881	PAID		
2223-1	LA000-942203-D0200-52024-502- - - - -	EXA0146874	07/28/2022	07/28/2022	25.00	Expense Accruals	SHT3000117865	EX
	Calhoun,Nicholas				ACH8000161881	PAID		
2223-1	LA000-942203-D0200-52024-502- - - - -	EXA0146874	07/28/2022	07/28/2022	40.00	Expense Accruals	SHT3000117865	EX
	Calhoun,Nicholas				ACH8000161881	PAID		
2223-1	LA000-942203-D0200-52024-502- - - - -	EXA0146874	07/28/2022	07/28/2022	404.10	Expense Accruals	SHT3000117865	EX
	Calhoun,Nicholas				ACH8000161881	PAID		
52024 USC EMPLOYEE TRAVEL DOMESTIC					719.10			
5 DIRECT EXPENSE					719.10			
D0200 ATHLETIC ACTIVITIES					(719.10)			
942203 LAN MEN S BASEBALL					(719.10)			
GL Activity								
FP <= 001 AND FP > 0 AND REGEXP_LIKE( JOURNAL_STATUS, '[PU]' ) AND OPERATING_UNIT LIKE 'LA000%' AND a.ACCOUNT LIKE '52024%'								
ACTUAL2223 as of 10/14/2022 03:59								
	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source	
2223-1	LA000-945503-A0001-52024-466- - - - -	EXA0146810	07/26/2022	07/26/2022	14.13	Expense Accruals	SHT3000117812	EX
	Flexico,Bridgett T				ACH8000161605	PAID		
52024 USC EMPLOYEE TRAVEL DOMESTIC					14.13			
5 DIRECT EXPENSE					14.13			
A0001 UNRESTRICTED OPERATING FUND					(14.13)			
945503 LAN OTHER ACADEMIC SUPPORT					(14.13)			

- To drill into the activity, click the specific expense you would like to view transaction details for within the system.



# GL Activity – Drill down

GL Activity FP <= 001 AND FP > 0 AND REGEXP\_LIKE( JOURNAL\_STATUS, '[PU]' ) AND OPERATING\_UNIT LIKE 'LA000%' AND a.ACCOUNT LIKE '52024%'

ACTUAL2223 as of 10/14/2022 03:59

Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
EXA0148874	07/28/2022	07/28/2022	250.00	Expense Accruals	SHT3000117865	EX
Calhoun, Nicholas			ACH8000161881	PAID		
EXA0148874	07/28/2022	07/28/2022	25.00	Expense Accruals	SHT3000117865	EX
Calhoun, Nicholas			ACH8000161881	PAID		
EXA0148874	07/28/2022	07/28/2022	40.00	Expense Accruals	SHT3000117865	EX
Calhoun, Nicholas			ACH8000161881	PAID		

SC\_GM\_DASHBOARD\_EXPENSE\_DTL- Grants Dashboard Expense Dtl

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(6 kb\)](#)

[View All](#)

Row	Expense Report	Report Description	Employee ID	Name	Expense Date	Line	Dist Line	Expense Type	Ticket Number	Distance	Merchant	Line Description	GL Unit	Oper Unit	Department	Fund	Account	Class	PC Bus Unit	Project	Activity	Cost Share	Expense Line Amt	Created On	Travel Auth ID	Advance ID	Amount Applied	Distribution Status
1	3000117865	Recruiting Trip	W58323899	Calhoun, Nicholas	07/07/2022	1	1	Hotel and Lodging		0.00		Hotel 7/7/22-7/13/22	USC01	LA000	942203	D0200	52024	502					404.100	07/22/2022				Distributed
2	3000117865	Recruiting Trip	W58323899	Calhoun, Nicholas	07/07/2022	2	1	Meal Expenses		0.00		Per Diem 7/7/22 Departed 10am	USC01	LA000	942203	D0200	52024	502					40.000	07/22/2022				Distributed
3	3000117865	Recruiting Trip		Calhoun, Nicholas	07/08/2022	3	1	Meal Expenses		0.00		Per Diem 7/8/22-7/12/22	USC01	LA000	942203	D0200	52024	502					250.000	07/22/2022				Distributed
4	3000117865	Recruiting Trip		Calhoun, Nicholas	07/13/2022	4	1	Meal Expenses		0.00		Per Diem 7/13/22 Returned 3pm	USC01	LA000	942203	D0200	52024	502					25.000	07/22/2022				Distributed

To drill into the activity, click the specific expense you would like to view transaction details for within the system.





# Demonstration

- Using the GL Activity



# GL Activity Key Take-Aways

- GL Activity is the transaction-level detail behind the other Intranet reports.
- Hyperlinks drill directly into PeopleSoft Finance or HCM Distribution.
- Always review fiscal period and measure.
- Look up specific transactions using Journal IDs.
- Use Line Description and Reference to help search for transactions. This is where writing a good journal line description to reflect the purpose of the JE comes becomes very useful.
- Total and burst options are also available.




# Financial Reports: GL Yearly Comparison



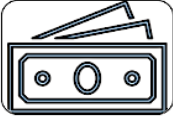
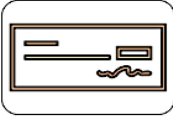

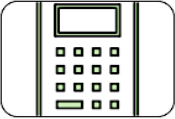
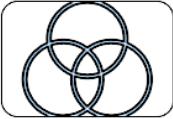
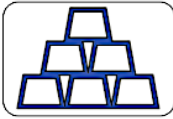




UNIVERSITY OF  
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# Finance Reports - GL Yearly Comparison

HUB - Finance Intranet - 

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/01/2023 02:29  
PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
<p><b>Fund Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>Non-USCSP Project Dashboard</b></p>  <p>Provides a listing of available cash balances, outstanding encumbrances and project end dates for a quick view at project statuses.</p>	<p><b>GL Yearly Comparison</b></p>  <p>GL Summary report with yearly comparisons for 2-5 years.</p>	<p><b>Budget Office</b></p>  <p>Budget to Actual with Prior Year.</p>
<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Select Financial Reports, then GL Yearly Comparison.



# GL Yearly Comparison – Search Criteria

Provides a year over year comparison of fiscal year data in the GL Summary format.

UNIVERSITY OF SOUTH CAROLINA HUB ▾ Finance Intranet ▾ GL YEARLY COMPARISON Sign out

**Operating Unit**  
CL037  
**Department**  
**Fund**  
A0001  
**Fund Group**  
**Class**  
**Account**  
5%  
**Account Type**  
**Account Category**  
**Account Subcategory**  
**Account Tree**

**Product (Term)**  
**Project BU**  
**Project**  
**Activity**  
**CFDA**  
**Contract**  
**Sponsor**  
**State Project**  
**Special Filter**  
None ▾  
 Show BUD000

**Output**  
5 Year Comparison ▾  
**Measure**  
ACTUAL YTD ▾  
**Fiscal Period**  
GL FY 2122 ▾


Submit Clear CSV

## Report Criteria:

- Search by Operating Unit, Fund, Account, Project or Sponsor.
- Output 2, 3, 4, or 5-year comparison.
- Select a Fiscal Period.



# GL Yearly Comparison – Data Review

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<b>Operating Unit</b> <input type="text" value="CL037"/>	<b>Product (Term)</b> <input type="text"/>	<b>Output</b> <input type="text" value="5 Year Comparison"/>
<b>Department</b> <input type="text"/>	<b>Project BU</b> <input type="text"/>	<b>Fiscal Period</b> <input type="text" value="GL FY 2122"/>
<b>Fund</b> <input type="text" value="A0001"/>	<b>Project</b> <input type="text"/>	
<b>Fund Group</b> <input type="text"/>	<b>Activity</b> <input type="text"/>	
<b>Class</b> <input type="text"/>	<b>CFDA</b> <input type="text"/>	
<b>Account</b> <input type="text" value="5%"/>	<b>Contract</b> <input type="text"/>	
<b>Account Type</b> <input type="text"/>	<b>Sponsor</b> <input type="text"/>	
<b>Account Category</b> <input type="text"/>	<b>State Project</b> <input type="text"/>	
<b>Account Subcategory</b> <input type="text"/>	<b>Special Filter</b> <input type="text" value="None"/>	
<b>Account Tree</b> <input type="text"/>	<input type="checkbox"/> Show BUD000	

## Search By:

- Operating Unit/Fund/Account
- In this example, CL037, A0001, 5% accounts.



# GL Yearly Comparison – Data Review

GL FY 2122 as of 10/21/2022 03:28	ACTUAL_YTD 1718	ACTUAL_YTD 1819	ACTUAL_YTD 1920	ACTUAL_YTD 2021	ACTUAL_YTD 2122	BALANCE CHANGE	PERCENT CHANGE
54200-OTHER FIXED CHARGES	28,697.65	36,046.63	30,276.71		18,394.12	(10,303.53)	(0.4)%
54230-OTHER FIXED CHG CREDIT CARD CH	5,341.83	5,639.96	3,407.18	1,217.10	7,240.43	1,898.60	0.4%
54520-TUITION/FEES-PARTICIPANTS NON-							
54525-GRADUATE ASSISTANT TUITION SUP	164,396.00	196,421.00	172,783.00	169,802.00	212,430.50	48,034.50	0.3%
54533-INCENTIVE UNDER 50.00		690.85	(346.09)	2,248.73	5,069.10	5,069.10	
54534-INCENTIVE OVER 50.00	258.00	1,449.00	4,228.00	780.00	150.00	(108.00)	(0.4)%
54550-SCHOLARSHIPS NON REPORTABLE	500.00	500.00	1,875.00	5,500.00	2,000.00	1,500.00	3.0%
56007-DATA PROCESSING EQUIPMENT							
56203-TECHNOLOGY & EQUIPMENT		138,002.28		47,672.51			
57020-BUILDING PURCHASE							
<b>TOTAL 5-EXPENSE</b>	<b>13,166,882.60</b>	<b>13,975,084.46</b>	<b>16,341,266.59</b>	<b>14,732,857.53</b>	<b>16,497,190.61</b>	<b>3,330,308.01</b>	<b>0.3%</b>

This example is a 5-year comparison of A Fund expenses for an entire operating unit. The fiscal period chosen was FY22, so each column above represents an entire fiscal year. If October 2022 was chosen the results would have shown each fiscal year to date through October of each year.



# GL Yearly Comparison – Data Review

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<b>Operating Unit</b> CL034	<b>Product (Term)</b> 	<b>Output</b> 5 Year Comparison ▾
<b>Department</b> 115%	<b>Project BU</b> 	<b>Fiscal Period</b> GL Current [OPEN] ▾
<b>Fund</b> 	<b>Project</b> 	
<b>Fund Group</b> 	<b>Activity</b> 	
<b>Class</b> 	<b>CFDA</b> 	
<b>Account</b> 4%	<b>Contract</b> 	
<b>Account Type</b> 	<b>Sponsor</b> SPN0001378	
<b>Account Category</b> 	<b>State Project</b> 	
<b>Account Subcategory</b> 	<b>Special Filter</b> None ▾	
<b>Account Tree</b> 	<input type="checkbox"/> Show BUD000	

Submit Clear CSV

## Search By:

- Operating Unit/Department/Account/Sponsor

**Note:** Fiscal Period was kept at GL Current (Open), so the comparison looks at each fiscal year to date (i.e. June-October for each year).



# GL Yearly Comparison – Data Review

GL-Current [OPEN] as of 10/14/2022 03:45	ACTUAL 1819	ACTUAL 1920	ACTUAL 2021	ACTUAL 2122	ACTUAL 2223	BALANCE CHANGE	PERCENT CHANGE
<b>4-REVENUE</b>							
41110-PRINTING SHOP 41110-PRINTING SHOP							
43000-RECOVERY OF INDIRECT COST 43000-RECOVERY OF INDIRECT COST							
48610-FEDERAL NON GRANT REVENUE 48610-FEDERAL NON GRANT REVENUE							
48617-C&G BILLED REVENUE 48617-C&G BILLED REVENUE	1,957,236.03	2,964,807.28	3,895,724.11	4,091,138.54	5,980,558.07	(4,023,322.04)	(2.1)%
48618-C&G UNIDENTIFIED REVENUE 48618-C&G UNIDENTIFIED REVENUE							
48650-GENERAL REVENUE 48650-GENERAL REVENUE		(279.20)					
<b>TOTAL 4-REVENUE</b>	<b>1,957,236.03</b>	<b>2,964,528.08</b>	<b>3,895,724.11</b>	<b>4,091,138.54</b>	<b>5,980,558.07</b>	<b>(4,023,322.04)</b>	<b>(2.1)%</b>

This example shows a 5-year revenue comparison by Sponsor, National Institutes of Health (NIH), for a specific department for the fiscal year-to-date.





# Demonstration

- Using the GL Yearly Comparison



UNIVERSITY OF  
**South Carolina**

# GL Yearly Comparison Key Take-Aways

- Understanding the **Fiscal Period** is very important to achieving correct report results.
- Versatile tool for easily comparing data over time and viewing trends without having to run multiple reports.
- Additional filters allow for more analytical options.
- Use the wildcard (%) to pull in additional search values.
- You can drill down into any of the expenses including payroll.




# Financial Reports: Grant Dashboard



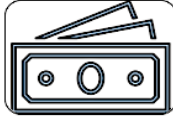
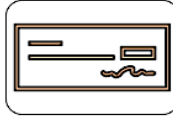

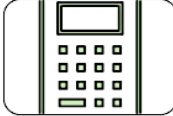
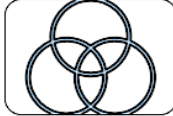
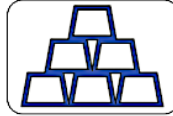




UNIVERSITY OF  
**South Carolina**

# Financial Reports: Grant Dashboard

HUB - Finance Intranet - 

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/01/2023 02:29  
PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
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<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Select Financial Reports, then Grant Dashboard.



# Grant Dashboard

- Provides Principal Investigators the ability to access expense data for USC sponsored projects (USCSP).
- Expenses will be grouped in the similar categories as shown on the Standard USC Invoice submitted to sponsors.
- Gives the ability to expand categories to show detail account codes.
- Provides budget and actual expenses for direct costs and cost share.
- Enables you to track cost share and ensure you are spending within ratio.



INVOICE NO:  
CGA0093550

Jan 15, 2024

University at Buffalo, SUNY  
ubsd.RFScontractInvoices@buffalo.edu



**ACH Payment**  
Banking Institution: Wells Fargo Bank, NA  
Routing Number: 121000248  
Account Number: 2000021014015  
Swift Code: WFBUS6S

**Check Payment**  
University of South Carolina  
Office of the Controller  
Grants and Funds Management  
1600 Hampton Street, 6th Floor  
Columbia, SC 29208

REIMBURSEMENT REQUEST FOR EXPENDITURES THROUGH Dec 31, 2023

GRANT NAME: Next-Generation Ammonia System Integration Utilizing Intermittent Renewable Power (REFUEL Integrations & Testing Program)

GRANT NUMBER: [REDACTED]

PRINCIPAL INVESTIGATOR: [REDACTED]

BUDGET PERIOD: 7/25/22 - 7/24/24

CATEGORY:	BUDGET AMOUNT	CURRENT AMOUNT	CUMULATIVE AMOUNT
1 SALARIES	66,364.00	3,120.28	44,180.01
2 FRINGE BENEFITS	2,275.00	14.04	1,999.55
3 TRAVEL	3,000.00	2,156.57	3,769.58
4 SUPPLIES	35,769.00	707.94	11,672.97
5 FIXED CHARGES	0.00	0.00	0.00
6 CONTRACTUAL SERVICES	0.00	0.00	22.90
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
<b>TOTAL DIRECT COST:</b>	<b>107,408.00</b>	<b>5,998.83</b>	<b>61,645.01</b>
<b>INDIRECT COST:</b>	<b>52,630.00</b>	<b>2,939.42</b>	<b>30,206.11</b>
<b>TOTAL COST:</b>	<b>160,038.00</b>	<b>8,938.25</b>	<b>91,851.12</b>
<b>COST SHARE (IF APPLICABLE):</b>	<b>100,000.00</b>	<b>2,196.07</b>	<b>42,860.98</b>

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

**TOTAL DUE**  
**\$8,938.25**

*Do not include Cost Share with Payment*

CONTRACT NUMBER: CON0006798  
PROJECT ID: 10012779  
DEPT ID: 155100  
BILLER04: Andrea Gack

*Mandy M Kibler*

Billing Authority: Mandy Kibler, Controller  
University of South Carolina

# PeopleSoft Standard Invoice



UNIVERSITY OF  
**South Carolina**

INVOICE NO:  
CGA0093550



Jan 15, 2024

University at Buffalo, SUNY  
ubsd.RFSubcontractInvoices@buffalo.edu

**ACH Payment**  
Banking Institution: Wells Fargo Bank, NA  
Routing Number: 121000248  
Account Number: 2000021014015  
Swift Code: WFBIUS6S

**Check Payment**  
University of South Carolina  
Office of the Controller  
Grants and Funds Management  
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Columbia, SC 29208

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PRINCIPAL INVESTIGATOR: [REDACTED]

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4 SUPPLIES	35,769.00	707.94	11,672.97
5 FIXED CHARGES	0.00	0.00	0.00
6 CONTRACTUAL SERVICES	0.00	0.00	22.90
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
<b>TOTAL DIRECT COST:</b>	<b>107,408.00</b>	<b>5,998.83</b>	<b>61,645.01</b>
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**TOTAL DUE**  
**\$8,938.25**  
*Do not include Cost Share with Payment*

CONTRACT NUMBER: CON0006798  
PROJECT ID: 10012779  
DEPT ID: 155100  
BILLER04: Andrea Gack

*Mandy M Kibler*  
Billing Authority: Mandy Kibler, Controller  
University of South Carolina

# Comparing the Invoice with the Grant Dashboard

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	3,120.28	44,180.01	22,183.99		22,183.99	38,720.00	17,260.74	21,459.26
FRINGE BENEFITS	2,275.00	14.04	1,999.55	275.45		275.45	13,629.00	5,688.23	7,940.77
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	2,156.57	3,769.58	(769.58)		(769.58)			
SUPPLIES	35,769.00	707.94	11,672.97	24,096.03		24,096.03			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	5,998.83	61,645.01	45,762.99		45,762.99	74,349.00	31,615.97	42,733.03
INDIRECT COST RECOVERY	52,630.00	2,939.42	30,206.11	22,423.89		22,423.89	25,651.00	11,245.01	14,405.99
INDIRECT EXPENSE	52,630.00	2,939.42	30,206.11	22,423.89		22,423.89	25,651.00	11,245.01	14,405.99
<b>TOTAL EXPENSE</b>	<b>160,038.00</b>	<b>8,938.25</b>	<b>91,851.12</b>	<b>68,186.88</b>		<b>68,186.88</b>	<b>100,000.00</b>	<b>42,860.98</b>	<b>57,139.02</b>

# Grant Dashboard – Output Options

HUB ▾ Finance Intranet ▾ GRANT DASHBOARD SUMMARY Home Sign out

<b>Operating Unit</b> <input type="text"/>	<b>Project</b> <input type="text"/>	<b>Class</b> <input type="text"/>
<b>Department</b> <input type="text"/>	<b>Project Status</b> Active ▾	<b>Fiscal Period</b> GL 2324 007-January [OPEN] ▾
<b>Fund</b> <input type="text"/>	<b>PI</b> <input type="text"/>	<input type="checkbox"/> <b>Display Account Chartfield</b>
<b>Contract</b> <input type="text"/>	<b>Business Manager (BM)</b> <input type="text"/>	<input checked="" type="radio"/> <b>Summary</b>
	<b>Sponsor</b> <input type="text"/>	

0s

- The default output option is **Detail**.
- Use the drop down to select **Summary**.
- Select the applicable fiscal period. The default is the current month.



HUB ▾ Finance Intranet ▾ GRANT DASHBOARD SUMMARY Sign out

**Operating Unit**

**Department**

**Fund**

**Contract**

**Project**

**Project Status**

Active ▾

**PI**

**Class**

**Fiscal Period**

GL 2324 007-January [OPEN] ▾

Display Account Chartfield

**Output**

Summary ▾

[Submit](#) [Clear](#) [CSV](#)

Project	Title	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
10012848	Project 47- Synthesis of Well	40,000.00	5,433.52	24,699.79	15,300.21		15,300.21			
10011280	REU Site: CO2 Chemical Engineering: Opportunities	413,036.00		252,220.45	160,815.55		160,815.55			
10013139	Fuel Flexible Gas Turbine Technology Integrated wi	100,000.00	4,965.29	28,261.69	71,738.31		71,738.31			
10012323	Design of New Catalysts for the Generation of Clea	587,990.00	9,893.39	416,698.46	171,291.54	2,115.00	169,176.54			
10012397	ONR - Development, Assessment and Simulation of En	138,437.00	3,008.47	93,403.36	45,033.64		45,033.64			
10012847	Project 47- Synthesis of Well	15,000.00		10,921.12	4,078.88	1,241.25	2,837.63			
10013138	Fuel Flexible Gas Turbine Technology Integrated wi	453,201.00	8,783.01	90,090.98	363,110.02		363,110.02			
10010963	Compact Catalytic Membrane	449,855.00	11,474.50	377,368.11	72,486.89		72,486.89	133,939.00	133,570.16	368.84
10012779	Next-Generation Ammonia System Integration Utilizi	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
10012395	ONR - Development, Assessment and Simulation of En	416,002.00	13,757.34	311,676.22	104,325.78	17,462.65	86,863.13			
10012324	Design of New Catalysts for the Generation of Clea	400,000.00	13,335.96	250,262.00	149,738.00		149,738.00			

	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
<b>REPORT TOTAL</b>	3,173,559.00	74,441.86	1,951,243.68	1,222,315.32	20,818.90	1,201,496.42	233,939.00	177,570.82	56,368.18

# Grant Dashboard – Summary Output

- Shows totals for each project using the selected criteria.
- Provides a **Report Total**.
- In this example, we are looking at **Active** projects for a **specific PI**.
- Can drill down into detail view by selecting any of the project numbers on the screen.



HUB ▾ Finance Intranet ▾ GRANT DASHBOARD Sign out

Operating Unit:   
 Department:   
 Fund:   
 Contract:

Project:   
 Project Status: Active ▾  
 PI:   
 Business Manager (BM):   
 Sponsor:

Class:   
 Display Account Chartfield  
 Output:

**10012848**  
 Project 47- Synthesis of Well    CeRCaS Phase II Memberships- NSF 1939876    CON0005084 U00032805    01/01/2023-02/29/2024 [14 months]

Operating Unit	Department	Fund	Class
CL040 ENGINEERING - COMPUTING	155100 CHEMICAL ENGINEERING RESEARCH	J1000 COMMERCIAL GRANT	202 INDIVIDUAL AND PROJECT RSRCH

**PROJECT TEAM**

Role	Name	USCID	Email
APPRV_1	Wagner,Alicia		<a href="mailto:alewin@mailbox.sc.edu">alewin@mailbox.sc.edu</a>
CGA	Williams,Sydney B		<a href="mailto:sydneymb@mailbox.sc.edu">sydneymb@mailbox.sc.edu</a>
PI	Lauterbach,Jochen Anton		<a href="mailto:lauteraj@mailbox.sc.edu">lauteraj@mailbox.sc.edu</a>

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [13 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	21,484.00	1,270.89	11,438.01	10,045.99		10,045.99			
FRINGE BENEFITS	97.00	5.08	50.84	46.16		46.16			
CONTRACTUAL SERVICES			200.00	(200.00)		(200.00)			
TRAVEL	1,000.00		1,317.61	(317.61)		(317.61)			
SUPPLIES	9,795.00	150.55	6,230.53	3,564.47		3,564.47			
SCHOLARSHIPS	7,624.00	4,007.00	5,462.80	2,161.20		2,161.20			
<b>DIRECT EXPENSE</b>	<b>40,000.00</b>	<b>5,433.52</b>	<b>24,699.79</b>	<b>15,300.21</b>		<b>15,300.21</b>			
<b>INDIRECT COST RECOVERY</b>									
<b>INDIRECT EXPENSE</b>									
<b>TOTAL EXPENSE</b>	<b>40,000.00</b>	<b>5,433.52</b>	<b>24,699.79</b>	<b>15,300.21</b>		<b>15,300.21</b>			

BURN RATE	(dollars)	2,857.14	1,899.98	COST SHARE RATIO	0.00%	0.00%
	(%)	7.14%	66.50%			

• Burn rate in dollars = the average monthly budget vs. actual expenses to determine if the spending on the award is above or below the average.  
 • Burn rate budget percentage = the average monthly expenditures as a percent of the total budget.  
 • Actual burn rate percentage = the actual average monthly expenses divided by the average monthly budget expenses to show if the spending on the award is above or below the average rate. An actual burn rate of below 100% would show spending slower than average, whereas a burn rate of above 100% would show spending faster than average.

# Grant Dashboard – Detail Output

- This is the default output option.
- Provides the project detail for all the projects the specific PI is responsible for.
- In this example, we are looking at **Active** projects for a **specific PI**.
- Can drill down into detail view by selecting any of the active links on the screen.

# Grant Dashboard – Search Criteria

Provides the ability to view by single project, contract, PI or Sponsor.

The screenshot shows the 'GRANT DASHBOARD' search criteria form. The form is organized into three columns. The left column contains 'Operating Unit', 'Department', 'Fund', and 'Contract' (highlighted with a red box). The middle column contains 'Project' (with value 10012779, highlighted with a red box), 'Project Status' (Active), 'PI', 'Include Co-PI in Criteria above' (checkbox), 'Business Manager (BM)', and 'Sponsor' (highlighted with a red box). The right column contains 'Class', 'Fiscal Period' (GL Current [OPEN], highlighted with a red box), 'Display Account Chartfield' (checkbox), and 'Output' (Detail). At the bottom are buttons for 'Submit', 'Clear', and 'CSV'.

- Enter the USCID number of specific PI or Business Manager to search for their projects.
- Search by Contract for grants with multiple projects or by a Specific Project.
- Select **Display Account Chartfield** to drill down into the Categories to see related accounts.
- For today's example, we will search by **Project** for fiscal period **2224 - January**.



# Grant Dashboard – Project Details

Here you can view the Project name, contract number, beginning/end date, Sponsor, and Project Team.

<b>10012715</b>			
<a href="#">Addressing Rural Cancer Disparities via Proactive</a>	Medical University of South Carolina	CON0006754 A23-0073-S002, 1R01CA268023-01A1	09/08/2022-08/31/2024 [23.7 months]
Operating Unit	Department	Fund	Class
CL034 PUBLIC HEALTH	115070 RURAL AND MINORITY RESEARCH	F1000 FEDERAL GRANT	202 INDIVIDUAL AND PROJECT RSRCH
PROJECT TEAM			
Role	Name	USCID	Email
BM	Godbold,Janie R		<a href="mailto:godboldj@mailbox.sc.edu">godboldj@mailbox.sc.edu</a>
CGA	Grady,Sylvira LaToya		<a href="mailto:gradysl@mailbox.sc.edu">gradysl@mailbox.sc.edu</a>
KEY	Chen,Brian Ken		<a href="mailto:bchen@mailbox.sc.edu">bchen@mailbox.sc.edu</a>
PI	Hung,Peiyin		<a href="mailto:hungp@mailbox.sc.edu">hungp@mailbox.sc.edu</a>

**BM** is the **Business Manager**  
**CGA** is the **Post Award Accountant**



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# Grant Dashboard – Data Review

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
<b>DIRECT EXPENSE</b>	<b>107,408.00</b>	<b>2,543.88</b>	<b>64,188.89</b>	<b>43,219.11</b>		<b>43,219.11</b>	<b>74,349.00</b>	<b>32,380.86</b>	<b>41,968.14</b>
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
<b>TOTAL EXPENSE</b>	<b>160,038.00</b>	<b>3,790.38</b>	<b>95,641.50</b>	<b>64,396.50</b>		<b>64,396.50</b>	<b>100,000.00</b>	<b>44,000.66</b>	<b>55,999.34</b>

- Total Budget for the project.
- Current Month Activity by each category.
- Balance equals the Budget minus the Life to Date Expenses.
- If there are encumbrances, they will populate in the Encumbrances column and be deducted to calculate the Available Balance.
- View cost share budget and actuals.



# Data Review - Encumbrances

- Encumbrances represent open purchases orders and obligations on the project; common examples include:
  - ✓ Subawards
  - ✓ Consultants
  - ✓ Equipment purchases
  - ✓ Other Contractual services
- Encumbrances **reduce your available balance**; must be reviewed regularly.
- De-obligation of encumbrances occur two different ways:
  1. **Subawards** – The final invoice must be received and paid prior to closing a purchase order related to a subaward. Closure and de-obligation of any subaward must be submitted to the Subaward Accountant ([subinv@mailbox.sc.edu](mailto:subinv@mailbox.sc.edu) ) to ensure needed coordination with the SAM Office occurs.
  2. **All Others** – Coordinate with your Business Manager to request closure directly to the purchasing office. ([purchase@mailbox.sc.edu](mailto:purchase@mailbox.sc.edu) )



# Data Review – Cost Share

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
<b>DIRECT EXPENSE</b>	<b>107,408.00</b>	<b>2,543.88</b>	<b>64,188.89</b>	<b>43,219.11</b>		<b>43,219.11</b>	<b>74,349.00</b>	<b>32,380.86</b>	<b>41,968.14</b>
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
<b>TOTAL EXPENSE</b>	<b>160,038.00</b>	<b>3,790.38</b>	<b>95,641.50</b>	<b>64,396.50</b>		<b>64,396.50</b>	<b>100,000.00</b>	<b>44,000.66</b>	<b>55,999.34</b>

- Portion of project costs not provided by the Sponsor.
- Most sponsors expect cost share to be charged in **ratio** throughout the life of the project.
- Be sure to work with your Post Award Accountant at the beginning of the funding to set this up appropriately.



# Search Criteria – Display Account Details

HUB ▾ Finance Intranet ▾ GRANT DASHBOARD Home Sign out

<b>Operating Unit</b> <input type="text"/>	<b>Project</b> <input type="text" value="10012779"/>	<b>Class</b> <input type="text"/>
<b>Department</b> <input type="text"/>	<b>Project Status</b> <input type="text" value="Active"/>	<b>Fiscal Period</b> <input type="text" value="GL Current [OPEN]"/>
<b>Fund</b> <input type="text"/>	<b>PI</b> <input type="text"/>	<input checked="" type="checkbox"/> <b>Display Account Chartfield</b>
<b>Contract</b> <input type="text"/>	<input type="checkbox"/> <b>Include Co-PI in Criteria above</b>	<b>Output</b> <input type="text" value="Detail"/>
	<b>Business Manager (BM)</b> <input type="text"/>	
	<b>Sponsor</b> <input type="text"/>	

- Select **Display Account Chartfield** to expand the Categories.
- Expanded view will display the account codes that roll into each category.

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	66,364.00			66,364.00		66,364.00	38,720.00		38,720.00
51300 UNCLASSIFIED EMPLOYEES			5,415.35	(5,415.35)		(5,415.35)		17,817.52	(17,817.52)
51400 NON FED WORK STUDY STUDENTS		1,397.64	40,162.30	(40,162.30)		(40,162.30)			
<b>SALARIES</b>	<b>66,364.00</b>	<b>1,397.64</b>	<b>45,577.65</b>	<b>20,786.35</b>		<b>20,786.35</b>	<b>38,720.00</b>	<b>17,817.52</b>	<b>20,902.48</b>
51900 FRINGE BENEFITS		5.59	2,005.14	(2,005.14)		(2,005.14)		5,896.34	(5,896.34)
51995 FRINGE EXPENSES BUDGET	2,275.00			2,275.00		2,275.00	13,629.00		13,629.00
<b>FRINGE BENEFITS</b>	<b>2,275.00</b>	<b>5.59</b>	<b>2,005.14</b>	<b>269.86</b>		<b>269.86</b>	<b>13,629.00</b>	<b>5,896.34</b>	<b>7,732.66</b>
52010 FREIGHT,EXPRESS AND DELIVERIES			22.90	(22.90)		(22.90)			
<b>CONTRACTUAL SERVICES</b>			<b>22.90</b>	<b>(22.90)</b>		<b>(22.90)</b>			
52022 STUDENT TRAVEL			2,156.57	(2,156.57)		(2,156.57)			
52024 USC EMPLOYEE TRAVEL DOMESTIC	3,000.00	159.82	1,772.83	1,227.17		1,227.17			
<b>TRAVEL</b>	<b>3,000.00</b>	<b>159.82</b>	<b>3,929.40</b>	<b>(929.40)</b>		<b>(929.40)</b>			
53000 SUPPLIES	35,769.00			35,769.00		35,769.00			
53004 DATA PROCESSING SUPPLIES			248.39	(248.39)		(248.39)			
53025 LAB SUPPLIES		980.83	12,195.41	(12,195.41)		(12,195.41)			
53031 COMP SOFTWARE UNDER \$100,000			210.00	(210.00)		(210.00)			
<b>SUPPLIES</b>	<b>35,769.00</b>	<b>980.83</b>	<b>12,653.80</b>	<b>23,115.20</b>		<b>23,115.20</b>			
54525 GRADUATE ASSISTANT TUITION SUP							22,000.00	8,667.00	13,333.00
<b>SCHOLARSHIPS</b>							<b>22,000.00</b>	<b>8,667.00</b>	<b>13,333.00</b>
<b>DIRECT EXPENSE</b>	<b>107,408.00</b>	<b>2,543.88</b>	<b>64,188.89</b>	<b>43,219.11</b>		<b>43,219.11</b>	<b>74,349.00</b>	<b>32,380.86</b>	<b>41,968.14</b>
59990 INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
<b>INDIRECT COST RECOVERY</b>	<b>52,630.00</b>	<b>1,246.50</b>	<b>31,452.61</b>	<b>21,177.39</b>		<b>21,177.39</b>	<b>25,651.00</b>	<b>11,619.80</b>	<b>14,031.20</b>
<b>INDIRECT EXPENSE</b>	<b>52,630.00</b>	<b>1,246.50</b>	<b>31,452.61</b>	<b>21,177.39</b>		<b>21,177.39</b>	<b>25,651.00</b>	<b>11,619.80</b>	<b>14,031.20</b>
<b>TOTAL EXPENSE</b>	<b>160,038.00</b>	<b>3,790.38</b>	<b>95,641.50</b>	<b>64,396.50</b>		<b>64,396.50</b>	<b>100,000.00</b>	<b>44,000.66</b>	<b>55,999.34</b>

# Data Review – Account Details

- Monthly activity ties to USC’s standard invoice sent to Sponsors to request reimbursement.
- Be sure to review the report you receive monthly for your projects ensuring the expenses are accurate.



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**From:** CONTROLLER@sc.edu <CONTROLLER@sc.edu>  
**Sent:** Monday, February 16, 2026 3:12 PM  
**To:** Patterson, Eric <JEPATTE@mailbox.sc.edu>  
**Subject:** Sponsored Award Monthly Summary Report

Hello,

Your monthly sponsored award summary report is now ready! This report will provide you a listing of all your active sponsored award projects and their available balances. To view; please select the link provided below. You may also log directly into the Grant Dashboard on the [Finance Intranet](#) to view this data.

Click here to view your [Grant Dashboard](#).

Click here to view your [HCM Earnings Summary](#).

Don't forget - you can drill down into the transactions by clicking the hyperlinks in the report! A job aid for using the Grant Dashboard is available on the [Controller's Office](#) website.

If you have questions regarding one of your projects, please reach out to your business manager or post award accountant.

Thank you,

**University of South Carolina**  
**Controller's Office**  
1600 Hampton Street  
Columbia, SC 29208  
(803) 777-2602

# Sponsored Award Monthly Summary Report



UNIVERSITY OF  
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# Drill Down – Salaries

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	66,364.00			66,364.00		66,364.00	38,720.00		38,720.00
51300 UNCLASSIFIED EMPLOYEES			5,415.35	(5,415.35)		(5,415.35)		17,817.52	(17,817.52)
51400 NON FED WORK STUDY STUDENTS		1,397.64	40,162.30	(40,162.30)		(40,162.30)			
<b>SALARIES</b>	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
51900 FRINGE BENEFITS		5.59	2,005.14	(2,005.14)		(2,005.14)		5,896.34	(5,896.34)
51995 FRINGE EXPENSES BUDGET	2,275.00			2,275.00		2,275.00	13,629.00		13,629.00

- Provides the ability to drill down into the expense activity. This provides the capability to view the specific \$ amounts for their students (not just % of effort).
- Click on the expense you want to see for additional detail and information.

# Drill Down – Salaries

GL Activity		FP = 007 AND REGEXP_LIKE( JOURNAL_STATUS, 'PUJ' ) AND a.ACCOUNT LIKE '51400%' AND (PROJECT LIKE '10012779%' OR OLD_PROJECT LIKE '10012779%')						
ACTUAL2324 as of 01/23/2024 03:14		Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2324-7	CL040-155100-F1000-51400-202-10012779-1- - -	<a href="#">PAY0178433</a>	01/09/2024	01/10/2024	1,397.64	HR Payroll Journals	<a href="#">&gt;&gt;HCM</a>	PAY
01/23/2024 18:26								

NAME	USCID	FISCAL PERIOD :	JOB	HCM	GROUP	PAY	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR	LBR
		JOURNAL		DEPT		PERIOD					\$	%
		2324-7 : <a href="#">PAY0178433</a>	SURA	155101	HRL	01/15/2024	8001506710	01/12/2024	A00000096943	CL040-155100-F1000-202-10012779-	45.50	100.00%
		2324-7 : <a href="#">PAY0178433</a>	SGRA	155101	I12	01/15/2024	8001507630	01/12/2024	A00000096943	CL040-155100-F1000-202-10012779-	1,270.89	100.00%
		2324-7 : <a href="#">PAY0178433</a>	SURA	155101	HRL	01/15/2024	8001506803	01/12/2024	A00000096943	CL040-155100-F1000-202-10012779-	81.25	100.00%
<b>TOTAL</b>											<b>1,397.64</b>	

- Can view specific payroll data by drilling down clicking the **HCM** hyperlink.

# Grant Dashboard – How to Use the Burn Rates

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
<b>TOTAL EXPENSE</b>	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
<b>BURN RATE</b>	(dollars)	6,696.15	5,033.76	<b>COST SHARE RATIO</b>			62.49%	46.01%	
	(%)	4.18%	75.17%						

- Burn Rates can be used to see the rate at which a budget is being spent.
- Can assist with the development of a spending strategy at the beginning and throughout an award.
- Remember: Be mindful of the timing of purchases on your awards.
- Purchasing large pieces of equipment, tuition expenses, etc. can cause spending spikes and the rates to be skewed.



# Grant Dashboard – How to Use the Burn Rates

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
<b>TOTAL EXPENSE</b>	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
<b>BURN RATE</b>	(dollars)	6,696.15	5,033.76	<b>COST SHARE RATIO</b>		62.49%	46.01%		
	(%)	4.18%	75.17%						

Total Budget/Life of Project  
 $160,038.00 / 23.9 \text{ months} = 6,696.15$

Life to Date Expenses/Months to Date  
 $95,641.50 / 19 \text{ months} = 5,033.76$

Monthly Budget Burn Rate/Total Budget  
 $6,696.15 / 160,038.00 = 4.18\%$

Life to Date Monthly Burn Rate/Monthly Budget Burn Rate  
 $5,033.76 / 6,696.15 = 75.17\%$



# Inactive Project

<b>10011832</b>				<b>*INACTIVE*</b>	
SC CCR&R PDG Family		SC Dept of Social Services		CON0005687 4400026259	
				04/30/2022-04/29/2023 [12 months]	
Operating Unit	Department	Fund	Class		
CL039 EDUCATION	152200 COE CHILD DEV RESEARCH CTR	G1000 STATE GRANT	301 COMMUNITY SERVICE		
PROJECT TEAM					
Role	Name	USCID	Email		
BM	Judge,Tara M		judgetm@mailbox.sc.edu		
CGA	Koon,Denise Frick		ddkoon@mailbox.sc.edu		
PI	McDonald,Melissa Jane		mm116@mailbox.sc.edu		

- Inactive projects will return as yellow.





# Demonstration

- Using the Grant Dashboard



# Grant Dashboard Key Take-Aways

- **Fiscal Period** always defaults to current period.
- **Project Status** always defaults to active.
- Use the Summary and Detail Output options to view more data.
- **Display Account Chartfield** checkbox will show all account information.
- Balance equals the Budget minus the Life to Date Expenses.
- Look at Cost share, the portion of project costs not provided by the sponsor.
- Remember, most sponsors expect cost share to be charged in **ratio** throughout the life of the project.
- All expense questions should be routed through your Post Award Accountant (**CGA**).
- This is the preferred tool when reviewing grants (USCSP projects 100xxxxx).




# Financial Reports: Non-USCSP Project Dashboard



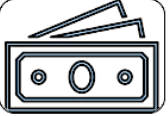
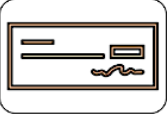

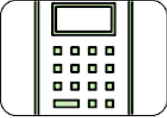
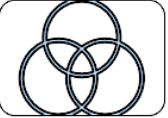
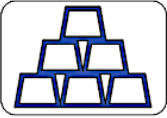




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# Finance Reports – Non-USCSP Project Dashboard

HUB - Finance Intranet - 

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/01/2023 02:29  
PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
<p><b>Fund Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>Non-USCSP Project Dashboard</b></p>  <p>Provides a listing of available cash balances, outstanding encumbrances and project end dates for a quick view at project statuses.</p>	<p><b>GL Yearly Comparison</b></p>  <p>GL Summary report with yearly comparisons for 2-5 years.</p>	<p><b>Budget Office</b></p>  <p>Budget to Actual with Prior Year.</p>
<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Select Financial Reports, then Non-USCSP Project Dashboard.



# Non-USCSP Project Dashboard – Search Criteria

HUB ▾ Finance Intranet ▾ NON-USCSP PROJECT DASHBOARD Home Sign out

**Operating Unit**

**Department**

**Fund**

**Project BU**

**Project**

**Project Status**  
All ▾

**PI**

**Project Type**  
All ▾

**Total**  
None ▾  
None  
Operating Unit  
Department  
Fund  
PC Business Unit  
Project End Date  
Project Type  
Principal Investigator

- Use this report to view projects that have ended or are ending. Use the drop-down menu for sort options
- Inactive projects are yellow.
- Encumbrances can be closed with Purchasing so that projects drop off the report.

**Remember:** Projects that have ended need to either be extended or closed out and inactivated.

# Non-USCSP Project Dashboard – Data Review

HUB - Finance Intranet - NON-USCSP PROJECT DASHBOARD Sign out

Operating Unit  
CL044

Department

Fund

Project BU

Project

Project Status  
All

PI

Project Type  
All

Total  
Project End Date

Fiscal Period  
GL 2324 005-November [OPEN]

Submit
Clear
CSV

0s

GL 2324 005-November [OPEN] as of 11/01/2023 02:59

Project	PCBU	Project Name	PI	Status	End Date	Op.Unit	Dept	Dept Name	Fund	Cash	Encumbrances	Balance
80004234	USCIP	SOCIAL WORK DEAN START UP		ACTIVE	06/30/2023	CL044	159000	COL OF SOCIAL WORK	N1300	439,920.72		439,920.72
50000533	USCSA	INDIA STUDY ABROAD		ACTIVE	06/30/2023	CL044	159000	COL OF SOCIAL WORK	D2000	600.96		600.96
50000707	USCSA	JAPAN MAYMESTER STUDY ABROAD		ACTIVE	06/30/2023	CL044	159000	COL OF SOCIAL WORK	D2000	2,849.94		2,849.94
<b>END 06/30/2023 TOTAL</b>										443,371.62		443,371.62
80004803	USCIP	SPARC:K FLYNN:SHAPED BY CAPITA		INACTIVE	07/31/2023	CL044	159000	COL OF SOCIAL WORK	N1400			
80004805	USCIP	SPARC:E KING:EXAMINING THE PER		ACTIVE	07/31/2023	CL044	159000	COL OF SOCIAL WORK	N1400	29.17		29.17
<b>END 07/31/2023 TOTAL</b>										29.17		29.17
80004413	USCIP	RACIAL/ETHNIC DISPARITIES MENT		ACTIVE	09/30/2023	CL044	159000	COL OF SOCIAL WORK	N1600	8.33		8.33

- All the Non-USCSP Projects (USCIP, USCSA, and USCEN) will return for the Operating Unit entered.
- In this example, we entered CL044 totaled by Project End Date.
- The returned results include the Project number, Type of Non-USCSP project, Status, **PI**, **Department Name**, and End date.
- Inactive are yellow.

# Non-USCSP Project Dashboard – Data Review

HUB ▾ Finance Intranet ▾ NON-USCSP PROJECT DASHBOARD 🏠 Sign out

<b>Operating Unit</b> CL032	<b>Project BU</b> USCIP	<b>Total</b> Fund
<b>Department</b> 	<b>Project</b> 	<b>Fiscal Period</b> GL 2324 005-November [OPEN]
<b>Fund</b> E%	<b>Project Status</b> All	
	<b>PI</b> 	
	<b>Project Type</b> All	

[Submit](#) [Clear](#) [CSV](#)

## Search By:

- Operating Unit and Fund “letter” using a wildcard
- PS Business Unit
- Totaled by Fund

# Non-USCSP Project Dashboard – Data Review

GL 2324 005-November [OPEN] as of 11/01/2023 02:59

Project	PCBU	Project Name	PI	Status	End Date	Op.Unit	Dept	Dept Name	Fund	Cash	Encumbrances	Balance
80001355	USCIP	START-UP FUNDS - BUCKHAULTS		ACTIVE	06/30/2028	CL032	111100	DRUG DISCOVERY AND BIOMED SCI	EN300	22,642.11	9,742.96	12,899.15
80001743	USCIP	START-UP FUNDS - KIARIS		ACTIVE	06/30/2028	CL032	111100	DRUG DISCOVERY AND BIOMED SCI	EN300	4,945.18		4,945.18
80001886	USCIP	STARTUP BRYAN LOVE		ACTIVE	06/30/2030	CL032	111500	CLINICAL PHARM AND OUTCOME SCI	EN300	2,412.70		2,412.70
<b>EN300 TOTAL</b>										29,999.99	9,742.96	20,257.03
80000067	USCIP	RESEARCH INCENTIVE		ACTIVE	06/30/2028	CL032	111000	COLLEGE OF PHARMACY	EN700	890,672.31		890,672.31

- Review the balances by fund letter.
- Results can be exported from the Non-USCSP Project Dashboard into Excel to filter, sort or consolidate as needed by clicking the **CSV** button.

# Non-USCSP Project Dashboard – Data Review

HUB ▾ Finance Intranet ▾ NON-USCSP PROJECT DASHBOARD Home Sign out

<b>Operating Unit</b> <input type="text" value="CL071"/>	<b>Project BU</b> <input type="text"/>	<b>Total</b> <input type="text" value="Fund"/>
<b>Department</b> <input type="text" value="122000"/>	<b>Project</b> <input type="text"/>	<b>Fiscal Period</b> <input type="text" value="GL Current [OPEN]"/>
<b>Fund</b> <input type="text" value="%700"/>	<b>Project Status</b> <input type="text" value="All"/>	
	<b>PI</b> <input type="text"/>	
	<b>Project Type</b> <input type="text" value="All"/>	

- Review projects by type.
- Inserting a wildcard sign in place of the fund letter will bring back projects for that category.
- %700 for instance will bring back all incentive projects.

# Non-USCSP Project Dashboard – Data Review

GL-Current [OPEN] as of 02/29/2024 03:11

Project	PCBU	Project Name	PI	Status	End Date	Op.Unit	Dept	Dept Name	Fund	Cash	Encumbrances	Balance
80000089	USCIP	RESEARCH INCENTIVE		ACTIVE	06/30/2028	CL071	122000	CRIMINOLOGY AND CRIM JUSTICE	EN700	55,478.53		55,478.53
EN700 TOTAL										55,478.53		55,478.53
80006060	USCIP	IDC RETURN - B. KLEIN	Klein,Brent Ryan	ACTIVE	12/31/2025	CL071	122000	CRIMINOLOGY AND CRIM JUSTICE	N1700	147.84		147.84
80006061	USCIP	IDC RETURN - C. METCALFE	Metcalfe,Christi Shauna	ACTIVE	12/31/2025	CL071	122000	CRIMINOLOGY AND CRIM JUSTICE	N1700	504.50		504.50
80006062	USCIP	IDC RETURN - G. ALPERT	Alpert,Geoffrey Philip	ACTIVE	12/31/2025	CL071	122000	CRIMINOLOGY AND CRIM JUSTICE	N1700	238.20		238.20
80006063	USCIP	IDC RETURN - T. ANDERSEN	Andersen,Tia Stevens	ACTIVE	12/31/2025	CL071	122000	CRIMINOLOGY AND CRIM JUSTICE	N1700	128.96		128.96
N1700 TOTAL										1,019.50		1,019.50
TOTAL										56,498.03		56,498.03

- Review the balances by category.
- Results can be exported from the Non-USCSP Project Dashboard into Excel to filter, sort or consolidate as needed by clicking the **CSV** button.

**From:** CONTROLLER@sc.edu <CONTROLLER@sc.edu>  
**Sent:** Monday, February 16, 2026 3:11 PM  
**To:**  
**Subject:** Non-USCSP Project Monthly Summary Report

Hello,

Your monthly internal grant report is now ready! This report will provide you a listing of all your active internal projects and their available balances. To view please click the link provided below. You may also log directly into the Non-USCSP Project Dashboard on the [Finance Intranet](#) to view this data.

Click here to view your [Non-USCSP Project Dashboard](#).

Don't forget - you can drill down into the transactions by clicking the hyperlinks in the report! A job aid for using the Non-USCSP Project Dashboard is available on the [Controller's Office](#) website.

If you have questions regarding one of your projects, please reach out to your business manager or the Controller's Office.

Thank you,

**University of South Carolina**  
**Controller's Office**  
1600 Hampton Street  
Columbia, SC 29208  
(803) 777-2602

# Non-USCSP Monthly Summary Report



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# Demonstration

- Using the Non-USCSP Project Dashboard



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# Non-USCSP Project Dashboard

## Key Take-Aways

- Use this tool to view all of your non-sponsored projects at the same time.
- Helpful to run at the end of each month to determine what projects need to be inactivated, funded, or extended.
- Provides end date, current cash balance, and outstanding amount of any purchase orders
- The projected cash balance is a combination of the actual cash balance and any outstanding commitments or encumbrances.




# Financial Reports: Fund Dashboard



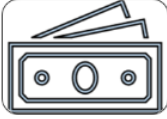
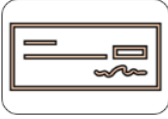

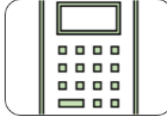
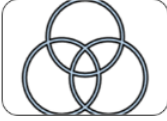
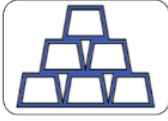




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# Finance Reports – Fund Dashboard

HUB - Finance Intranet - 

Boyd, Tiffany  
PERKINTD@mailbox.sc.edu as of 11/05/2023 01:39  
PERKINTD - V58683307

<p><b>Grant Dashboard</b></p>  <p>Sponsored research awards (USCSP projects). Provides budget vs. actual comparisons for direct and cost share expenditures by invoice categories.</p>	<p><b>GL Summary</b></p>  <p>Financial summary data with advanced filters</p>	<p><b>GL Dashboard</b></p>  <p>Provides current and available balances by category using budget to actual comparisons, approvers, and monthly expense transaction listing.</p>	<p><b>GL Activity</b></p>  <p>Transaction level detail with drilldown functionality into PeopleSoft Finance and HCM Distribution.</p>
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<p><b>USCeRA</b></p> 	<p><b>PS Finance</b></p>  <p>Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.</p>		

- Select Financial Reports, then Fund Dashboard.



# Fund Dashboard – Search Criteria

HUB ▾ Finance Intranet ▾ FUND DASHBOARD Home Sign out

<b>Operating Unit</b> CL034	<b>Fund Status</b> All ▾	<b>Total</b> Department ▾
<b>Department</b> 	<b>Attribute</b> All ▾	<b>Fiscal Period</b> GL Current [OPEN] ▾
<b>Fund</b> E%		
<b>Fund Group</b> 		

[Submit](#) [Clear](#) [CSV](#)

- Review by Operating Unit, Department, or Fund.
- Several total options.
- Ability to use wildcards (%) to return additional values.
- In this example, we will use E% to bring back all E Funds within operating unit CL034 totaled by Department.

# Fund Dashboard – Data Review

Dept	Dept Description	Fund	Fund Description	Fund Group	Status	Op.Unit	Op.Unit Description	Cash	Encumbrances	Balance
115200 TOTAL								97,181.01		97,181.01
115300	DEPARTMENT OF EXERCISE SCIENCE	E0020	CPARG	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	2,727.11		2,727.11
115300	DEPARTMENT OF EXERCISE SCIENCE	E0430	PAPH PARTICIPANT FEES	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	116,828.75	120,650.00	(3,821.25)
115300	DEPARTMENT OF EXERCISE SCIENCE	E1316	BEATTIE/RESEARCH ACCOUNT	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	1,350.00		1,350.00
115300	DEPARTMENT OF EXERCISE SCIENCE	E1344	NEUROBIOLOGY AND BEHAVIOR RESE	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	1,493.40		1,493.40
115300	DEPARTMENT OF EXERCISE SCIENCE	E1345	INTEGRATIVE MUSCLE BIOLOGY LAB	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	(788.69)		(788.69)
115300	DEPARTMENT OF EXERCISE SCIENCE	E2014	GOODBODIES PROGRAM	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	2,299.61		2,299.61
115300	DEPARTMENT OF EXERCISE SCIENCE	E2017	ARNOLD CHILDHOOD OBESITY INIT	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	20,951.13	7,196.23	13,754.90
115300	DEPARTMENT OF EXERCISE SCIENCE	EN700	INCENTIVE	CURRENT UNRESTRICTED	ACTIVE	CL034	PUBLIC HEALTH	(702.88)		(702.88)
115300 TOTAL								144,158.43	127,846.23	16,312.20

- Summarizes the balances by each Fund for the Operating Unit.
- Drill down capability.



# Demonstration

- Using the Fund Dashboard



# Fund Dashboard

## Key Take-Aways

- Fund Dashboard shows Cash balances; encumbrances, and available balance by Fund.
- Hyperlinks give you the ability to drill down.
- You can total by Operating Unit and Fund Group.
- Will not work with project accounts. Must use Non-USCSP and Grant Dashboard for those accounts.



# Introduction to Payroll Reports




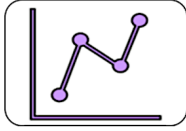




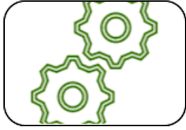


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# Payroll Reports: HCM Distribution

UNIVERSITY OF South Carolina HUB Sign out

Callahan, Joanne  
JOANNEC@mailbox.sc.edu as of 11/02/2023 02:34  
JOANNEC - Y61544101

- Payroll Reports**  

- Financial Reports**  

- Student and Tuition Reports**  

- Analytics**  

- Faculty Reports**  

- Facilities Reports**  

- Legacy Reports**  

- Controller's Office**  

- System**  


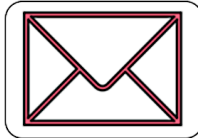


# Payroll Reports: HCM Distribution

UNIVERSITY OF South Carolina HUB HCM DISTRIBUTION Sign out

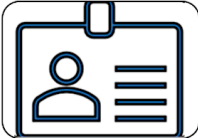
**Callahan, Joanne**  
JOANNEC@mailbox.sc.edu as of 11/02/2023 02:34  
JOANNEC - Y61544101

**HCM Distribution**




Per pay period data by employee and chartfield

**Employee Analysis**




Employee Job Data Changes

**Salary Report**



Annual employee salaries and additional pay

**PS HCM**



Note: PeopleSoft Finance and PeopleSoft HCM cannot be used in the same internet browser simultaneously.

**Info**

- HCM Distribution Group required to view this page.
- Excel Journal Import
- HCM Distribution Membership List
- HCM Distribution New Membership
- HCM Distribution Row Level Permission List
- HCM Distribution New Row Level Permission



# HCM Distribution – What information is provided?

Provides a listing of all employees within the payroll system using a given set of parameters.

The listing displays payroll information by employee, including:

- pay group,
- funding chartfield,
- gross earnings, and the
- cost of each employee's benefits to the department.



# Why is this tool important?

Used to complete a review and reconciliation of payroll charged to account.

- Verify accuracy of employees charged
- Review total compensation and also percent charged to each chartfield string.
- Verify the chartfield string(s) charged are accurate

Used to detect any errors or problems and assist with any needed corrections.



## Office of the Controller

Office of the Controller

General Accounting

 Grants and Funds  
 Management

 Compliance and Tax  
 Management

Payroll Department

 Operational Management  
 and Reporting

 External Financial Reporting  
 and Transparency

 Resource and Training  
 Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies &amp; Procedures

Forms

Newsletters

PeopleSoft Finance Training Schedule

Listservs

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## Resource and Training Toolbox

Welcome to our Resource and Training Toolbox! This toolbox is created to empower our system users by ensuring they are prepared and knowledgeable. It provides self-paced tutorials, hands-on training, recorded webinars, and supporting quick reference guides. All resources cover the university's suite of business processes from beginning to end.

## Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall.

[Access Business Manager Training Resources »](#)

## Grant Administration

Grant Administration of Sponsored Awards supports academic and administrative business units to include personnel management, fiscal operations, and coordination with multiple governing areas to ensure compliance with Uniform Guidance and grant awards.

[Access Grant Administration Training Resources »](#)

## Principal Investigator

A *Principal Investigator* or *PI* is the individual responsible for the preparation, conduct, and administration of a research grant. The page includes a list of tasks a Principal Investigator may be responsible for as the administrator of a research grant. Sections include links to training resources that support each task.

[Access Principal Investigator Training Resources »](#)

## Policies &amp; Procedures

The Controller's Office provides policies and procedures for Compliance.

 PeopleSoft Finance  
 Access

To request access to PeopleSoft Finance, complete the [PeopleSoft Finance Access Form \[pdf\]](#) and email the form to [pssecure@mailbox.sc.edu](mailto:pssecure@mailbox.sc.edu).

 PeopleSoft HCM  
 Access

To request access to PeopleSoft HCM, complete the [HCM Access Form](#) and upload to a Service Now Ticket.

# Additional Resources

Webinar recordings and training aids are available on the Controller's Office website under:

- [Operational Management and Reporting](#)
- [Resource and Training Toolbox](#)



## Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

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### PeopleSoft Finance Training Schedule

#### Top Ten Q&A Series

This webinar series is designed to address the most frequently asked questions we receive. The session will begin with a review of the top ten questions and answers noted by our office, providing clear guidance and best practices. Following this overview, the second portion of the session will be dedicated to open Q&A, allowing participants to ask questions directly and receive real-time clarification from our team.

What	When	Where
<a href="#">Accounts Payable Top Ten Q&amp;A</a>	Wednesday, October 22nd, 2025 at 2:00 PM	Online (Teams Meeting)
<a href="#">Travel Top Ten Q&amp;A</a>	Wednesday, November 5th, 2025 at 2:00 PM	Online (Teams Meeting)
<a href="#">Supplier Top Ten Q&amp;A</a>	Tuesday, November 11th, 2025 at 2:00 PM	Online (Teams Meeting)
<a href="#">Chart of Accounts Top Ten Q&amp;A</a>	Wednesday, January 14th, 2026 at 2:00 PM	Online (Teams Meeting)
<a href="#">Card Programs Top Ten Q&amp;A</a>	Thursday, January 15th, 2026 at 2:00 PM	Online (Teams Meeting)
<a href="#">Transaction Corrections Top Ten Q&amp;A</a>	Tuesday, January 27th, 2026 at 2:00 PM	Online (Teams Meeting)
<a href="#">Time and Effort Top Ten Q&amp;A</a>	Thursday, January 29th, 2026 at 2:00 PM	Online (Teams Meeting)
<a href="#">P-Card Purchasing Shared Service Q&amp;A</a>	Tuesday, February 3rd, 2026 at 9:00 AM	Online (Teams Meeting)
<a href="#">Payroll Top Ten Q&amp;A</a>	Tuesday, February 3rd, 2026 at 2:00 PM	Online (Teams Meeting)
<a href="#">Time and Labor Top Ten Q&amp;A</a>	Thursday, February 5th, 2026 at 2:00 PM	Online (Teams Meeting)

#### On Demand Training

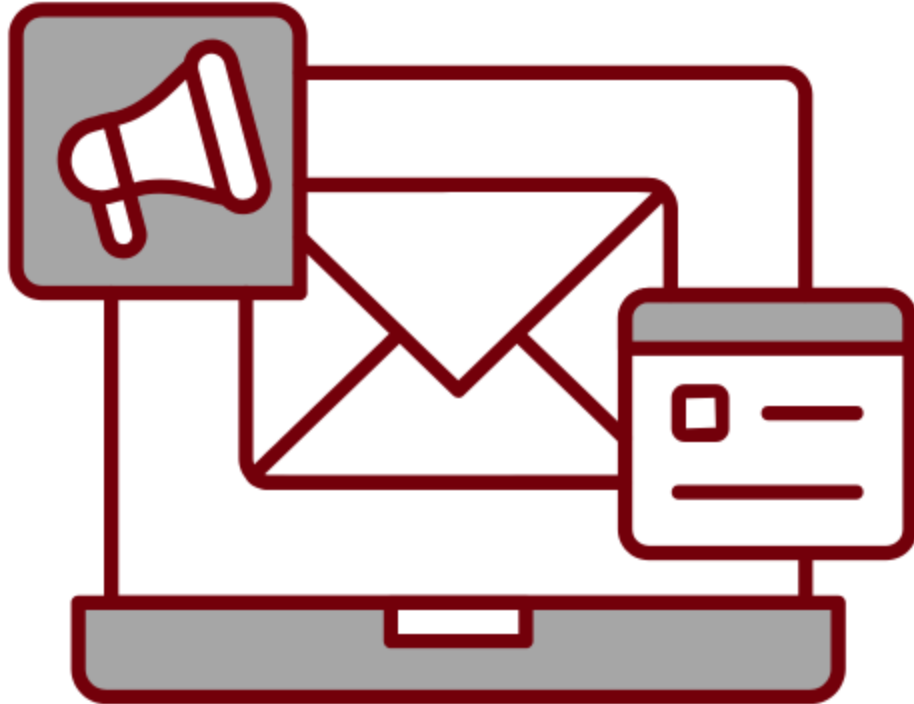
The Controller's Office offers on demand training. To complete the training, click the corresponding link that will take you to the training quiz. Once you finish the training with a score of 80% or higher, a confirmation email will be sent to you with additional information.

# Where to Register for Training

To register for scheduled trainings, visit our [PeopleSoft Finance Training Schedule](#) page.



# Contact Us



For specific questions, please visit our [website](#) to find the appropriate contact.



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# Questions



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# THANK YOU!

## Office of the Controller



Alone, we can do so little; together,  
we can do so much.



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