



UNIVERSITY OF
SOUTH CAROLINA

Controller's Office
Using the Finance Intranet

March 9, 2022

Today's Agenda

- What is the Hub
 - Finance Intranet
 - GL Dashboard
 - Grant Dashboard
 - GL Summary
 - GL Activity
 - HCM Payroll Distribution
- Where to Find Resources
- Contacts




What is the HUB

- An internal reporting site that houses various reporting tools and resources used to research PeopleSoft transactions and retrieve account balances.
- The two main sections covered today are:
 - Finance Intranet
 - HCM Distribution
- It also provides access to Legacy financial data prior to FY2016.
 - Use the crosswalk in PeopleSoft to translate the old legacy dept/fund chartfield information when reviewing data prior to conversion.



The HUB



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HUB ▾ HOME

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BOYD, TIFFANY

PERKINTD@mailbox.sc.edu as of 08/20/2020 01:47

PERKINTD -

Main Navigation

- [Finance Intranet](#)
Reporting solution for PeopleSoft Finance data.
- [HCM Distribution](#)
HCM Payroll Distribution Reports.
- [Legacy Intranet](#)
Legacy reporting solution for Mainframe data.
- [Payroll Reports](#)
Mainframe departmental Payroll labor and fringe reports.
- [Time and Effort Admin](#)
Time and Effort system with Administrative tools.
- [Travel Authorization](#)
Legacy TA - Travel Authorization Quick Form.

Info

- Welcome
This site is maintained and supported by Finance IT. If you have any issues please let us know. intranet@mailbox.sc.edu



What is the Finance Intranet

The Finance Intranet provides access to the following tools:

- **GL Dashboard:** Provides current and available balance using budget to actual comparison and detailed monthly statement of Accounting transactions.
- **Grant Dashboard:** Designed specifically for sponsored award (USCSP) grant projects. Provides the ability to view expenses grouped into categories as shown on the Standard USC Invoice submitted to sponsors.
- **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.



What is HCM Distribution

The HCM Payroll Distribution tool:

- Provides a listing of all employees within the payroll system using a given set of parameters.
- Provides payroll information by employee, including their pay group, funding chartfield, gross earnings, and the cost of each employee's benefits to the department.

HCM Distribution is in the same format as the old Payroll HUB that was used for legacy payroll, with some additional search criteria options for enhanced reporting.



Who can use this tool?

- Business Managers/Budget Officers
- Grant Administrators
- PIs



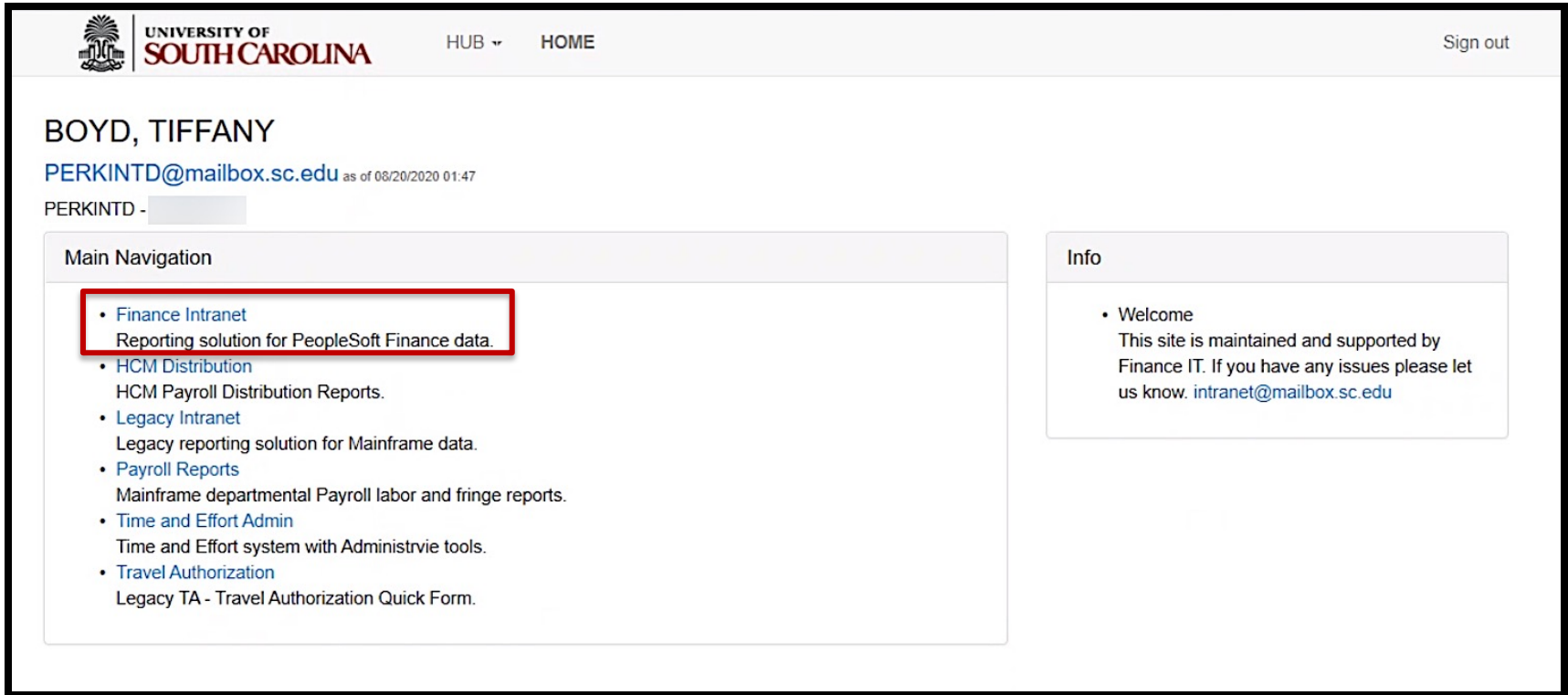
FINANCE INTRANET GL DASHBOARD



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The HUB - Navigation

To access the HUB, go to <https://www.admin.sc.edu/>.



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Access: Users will have access to the same departments/projects as they have in Finance PeopleSoft. To request access, complete the [Finance Access Form](#).

Finance Intranet – GL Dashboard



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Reports

- [GL Dashboard](#)

GL Dashboard's intent is to provide a one stop shop, if you are not sure where to start, start here. This report can provide titles for departments, funds, grants - listing of PIs, co-PIs, approvers - current and available balance using budget to actual comparison - detailed monthly statement of transactions ... More functionality is planned in future either added to this report or as a separate report. NOTE: This report currently only provides balance information, but does allow you to drill down to the GL Activity Report which has detail.
- [Grant Dashboard](#)

Grant Dashboard.
- [GL Summary](#)

GL Summary's intent is to provide a more advanced reporting view to allow users to filter, group and burst summary data. Also providing drill down to the GL Activity Report which has detail.
- [GL Activity](#)

GL Activity's intent is to provide the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level. Also attempting to provide drill down capability when available into PeopleSoft to view further information on each transaction. Note when a paper-clip icon displays, it is indicating that there is a supporting attachment on that transaction.
- [Budget Office: Budget to Actual with Prior Year](#)

Budget Office report of Budget to Actual with Prior Year Period. Most meaningful for A accounts, it provides a high-level balance of Budget, Actual, Percent of Budget Remaining, Prior Year Period Actual and Change, difference between current and prior year period actuals in dollars and percent.

Basic Training Videos

- [What is finance intranet?](#)
- [Where is finance intranet?](#)
- [How do I access finance intranet?](#)
- [Not sure where to start?](#)
- [Start with chartfield value.](#)
- [Start with legacy dept. fund.](#)
- [Who is on my grant team?](#)
- [Who is on my activity team?](#)
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- [What was my prior period balance?](#)
- [How do I bookmark and share?](#)



GL Dashboard – Search Criteria

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

The screenshot shows the University of South Carolina Finance Intranet GL Dashboard search criteria form. The form is organized into three columns. The left column contains Department (155001), Fund (A0001), and USCID (empty). The middle column contains Project (empty), Activity (empty), Project Reference (empty), and a checkbox for Show BUD000. The right column contains Class (empty), Product (Term) (empty), Statement (Direct Expenses), Fiscal Period (GL 2122 008-February [OPEN]), and a checked checkbox for Display Account Chartfield. At the bottom, there are three buttons: Submit, Clear, and CSV.

Search By:

- Department , 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 – Another Search Option

The screenshot displays the University of South Carolina Finance Intranet GL Dashboard. The main interface includes search filters for Department, Fund, USCID, Project, and Class. A dropdown menu for 'Operating Unit' is open, listing various units such as AK000 - AIKEN, BF000 - BEAUFORT, CL000 - GENERAL FUND, and CL010 - FINANCE. A red box highlights the text '74 Multiple Matching Operating Units' in the Operating Unit filter section. The dashboard also shows summary statistics at the bottom: 15021 Multiple Matching Projects - Activities, 880 Multiple Matching PIs, 554 Multiple Matching Sponsors, and 2027 Multiple Matching Awards.

If unsure where to start, click the available links to select from a list of options.

- Selecting the Operating Unit is a great place to start.

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	[USCID]	dorrellk@cec.sc.edu
APPRV_1	Shannon Lackey	[USCID]	svlackey@cec.sc.edu
APPRV_2	Alicia Stoll Williams	[USCID]	alstoll@cec.sc.edu

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



GL Dashboard – Data Review

GL-Current [OPEN] as of 03/03/2022 03:34	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
- Actual Resources



GL Dashboard – Data Review

GL-Current [OPEN] as of 03/03/2022 03:34	BUDGET	ACTUAL	CURRENT BALANCE	PRE ENC.	ENC.	AVAILABLE BALANCE
TOTAL DIRECT EXPENSE	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)
TOTAL USE	27,185,493.00	19,093,579.48	8,091,913.52			8,091,913.52

The GL Dashboard provides:

- Budgeted Uses
- Actual Uses
- Available Balances
- Summarized by category and by account code
- Drill down capability



GL Dashboard – Statement Details

FACULTY, DEANS, ACAD. DEPT HEAD

10,751.00

(10,751.00)

GL Activity

FP <= 009 AND REGEXP_LIKE(JOURNAL_STATUS, '[PU]') 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 03/03/2022 03:56

	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
Dohan,David Carl	Dohan,David Carl			PCARD24430991314083355026219-23096411111			
2122-7 CL040-155001-A0001-53004-101- ----10009287	AP00134287	01/04/2022	01/18/2022	43.36	AP Accruals	VO02063999	AP
DELL MARKETING LP	PO2000060846			CHK5000673388	PAID AND CLEARED		
2122-7 CL040-155001-A0001-53004-101- ----10009287	AP00134287	01/04/2022	01/18/2022	54.12	AP Accruals	VO02063999	AP
DELL MARKETING LP	PO2000060846			CHK5000673388	PAID AND CLEARED		
2122-7 CL040-155001-A0001-53004-101- ----10009287	AP00134797	01/25/2022	01/27/2022	8,445.25	AP Accruals	VO02075411	AP
DELL MARKETING LP	PO2000060846			CHK5000675251	PAID AND CLEARED		
- TOTAL				(9,076.21)			

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



GL Dashboard – Statement Details

GL Activity

FP <= 009 AND REEXP_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 03/03/2022 03:56

Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
EXA0132217	12/03/2021	12/03/2021	533.48	Expense Accruals	SHT3000097339	EX
Dohan,David Carl		Dohan,David Carl		PCARD24430991314083355026219-2309641111		

SC_GM_DASHBOARD_EXPENSE_DTL- Grants Dashboard Expense Dtl

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

First 1-5 of 5 Last

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	Location	Acctg Date	Budget Header Status	Budget Line Status	Exception Type
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				Distributed		12/03/2021	Valid	Valid	
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				Distributed		12/03/2021	Valid	Valid	
3	3000097339	November 2021	N38462378	Dohan, David Carl	11/10/2021	3	1	DATA PROCESSING SUPPLIES		0.00	DMI* DELL K-12/GOVT	Summit - Lab Printing supplies	USC01	CL040	155001	A0001	53004	101					533.480	12/02/2021				Distributed		12/03/2021	Valid	Valid	
4	3000097339	November 2021	N38462378	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				Distributed		12/03/2021	Valid	Valid	
5	3000097339	November 2021	N38462378	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				Distributed		12/03/2021	Valid	Valid	

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



GL Dashboard – Statement Details

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

2122-7 CLO
 D
 2122-7 CLO

Juals	VO02063999	AP
ND CLEARED		
Juals	VO02063999	AP

Invoice No: 40548924924 Customer No: 444200270 Order No: SEE BELOW Page 2 of 2

Voucher Inquiry Results

1-1 of 1 | View All

Voucher Details | **Amounts** | More Details | Supplier Details

Actions	Business Unit	Voucher ID	Transaction Currency	Gross Invoice Amount	Voucher Unpaid Balance	Unapplied Prepayments	Total Non-Merch	Entered VAT	Gross Amount Paid	Net Amount Paid
▼ Actions	USC01	02063999	USD	90.26	0.00	0.00	7.22	0.00	90.26	90.26

Invoice Line

750-ABBW 5820/7820 Adapter bracket/ears for 770-BBJJ 3U Rack Rail kit

Item Number	Description	Qty	Unit	Unit Price	Amount
750-ABBW	5820/7820 Adapter bracket/ears for 770-BBJJ 3U Rack Rail kit	1	EA	40.15	40.15

SHIP TO: SWEARINGEN ENGINEERING CE-1D35
 JUSTIN HICKS
 COL OF ENGR & 15500
 315 MAIN ST RM 1D35
 COLUMBIA, SC 29208

770-BBJJ Ready Rails 3U Sliding Rails,CusKit

Item Number	Description	Qty	Unit	Unit Price	Amount
770-BBJJ	Ready Rails 3U Sliding Rails,CusKit	1	EA	50.11	50.11

Order Number(s): 304609488, 304616129

1 of 2 | View All

Activity	Cost Share	Prod
	10009287	

1-1 of 1 | View All



GL Dashboard – Statement Details

GL Activity

FP <= 009 AND REGEXP_LIKE(JOURNAL_STATUS, '[PU]') AND DEPARTMENT LIKE '155001%' AND FUND LIKE 'A0001%' AND a.ACCOUNT LIKE '51200%' AND ACCOUNT_FUNCTION LIKE 'USE%' AND ACCOUNT_SUBTYPE LIKE 'DIRECT EXPENSE%' AND ACCOUNT_CATEGORY LIKE 'E101%' AND ACCOUNT_SUBCATEGORY LIKE 'E01%'

ACTUAL2122 as of 03/03/2022 03:56	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 hrly		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

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		07/15/2021	A00000001702	CL040-155001-A0001-101--	1,885.42	100.00%
...	...	2122-1 : PAY0123964	AM68	155020	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	3,538.13	100.00%
...	...	2122-1 : PAY0123964	AH10	155201	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	2,248.88	100.00%
...	...	2122-1 : PAY0123964	AH10	155901	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	2,229.71	100.00%
...	...	2122-1 : PAY0123964	AH10	155301	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	1,716.54	100.00%
...	...	2122-1 : PAY0123964	AH10	155602	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	2,087.71	100.00%
...	...	2122-1 : PAY0123964	AH10	155020	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	1,622.92	100.00%
...	...	2122-1 : PAY0123964	AD20	155020	C12	07/15/2021		07/15/2021	A00000001702	CL040-155001-A0001-101--	1,766.88	100.00%

2122-4	CL040-155001-A0001-51200-101- ----	PAY0130234	10/27/2021	10/28/2021	191.75	HR Payroll Journals	>>HCM	PAY
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Click the specific expense you would like to view transaction details for within the system. A paperclip indicates there is an attachment.

Using the GL Dashboard

- Live Demonstration



Inactive Project


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80003206 *INACTIVE*

MADNESS IN FRNCH ATLNTIC WORLD USCIP - Internal Project 06/04/2019-12/31/2021 [941]

C00000123

PROJECT TEAM

Role	Name	USCID	Email
APPRV_1	Goblirsch, Kurt G.	[REDACTED]	kggoblir@mailbox.sc.edu
APPRV_1	Klie, Susan Bonk	[REDACTED]	sklie@mailbox.sc.edu
APPRV_1	Vazsonyi, Nicholas	[REDACTED]	nvazsony@mailbox.sc.edu

Summary PROJECT LIKE '80003206%' AND FP <= 008

GL 2122 008-February as of 03/03/2022 03:34	BUDGET	ACTUAL	CURRENT BALANCE	PRE ENC.	ENC.	AVAILABLE BALANCE
10300 DUE TO/DUE FROM CLAIM ON CASH						
CASH HELD BY STATE TREASURER						
SUBTOTAL CASH HELD BY STATE TREASURER						
TOTAL ASSET						
TOTAL NET ASSET						
32000 ALLOCATED FUND BALANCES						
FUND BALANCE - RECURRING						
SUBTOTAL FUND BALANCE - RECURRING						
TOTAL FUND BALANCE						



Inactive internal projects will return as yellow.

GL Dashboard – Key Take-Aways

- Always select a **Fiscal Period**.
- Use the **Display Account Chartfield** checkbox to view account information.
- When reviewing the GL Dashboard for budget purposes be sure to leave the class field empty.
- Remember, you can drill down into any of the expenses including payroll.
- You can also drill down into the budgeted transactions.
- Recommended tool to use when reviewing USCIP projects (8000XXXX).
- Use the Grant Dashboard when reviewing grants or USCSP projects (100XXXXX).



Helpful Tip!


- 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 and you will receive the below 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.



GRANT DASHBOARD



Finance Intranet – Grant Dashboard

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Grant Dashboard - Search Criteria

Provides the ability to view expenses grouped into categories as shown on the Standard USC Invoice submitted to sponsors.

The screenshot shows the 'GRANT DASHBOARD' search interface. At the top left is the University of South Carolina logo and name. Navigation links include 'HUB', 'Finance Intranet', and 'GRANT DASHBOARD'. A 'Sign out' link is at the top right. The search form contains several fields: 'Department', 'Fund', and 'Contract' on the left; 'Project' (containing '10008822'), 'PI', and 'Sponsor' in the center; and 'Class' and 'Fiscal Period' (containing 'GL 1920 010-April') on the right. A checkbox for 'Display Account Chartfield' is also present. At the bottom are 'Submit', 'Clear', and 'CSV' buttons. A '0s' timer is in the bottom right corner.

- Search by Contract for grants with multiple projects or by a specific 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

For today’s example, we will search by **Project** for fiscal period **1920 April**.

PeopleSoft Standard Invoice



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INVOICE NO. CGA0054577

University of South Carolina

May 15, 2020

USDE - Drawdown
USDE - Drawdown
400 Maryland Ave, SW
Washington DC 20202
USA

Make Checks Payable
To and mail directly
to:

IMMED

University of South Carolina
Grants and Funds Management
1600 Hampton Street
Room # 612
Columbia, SC 29208
USA

REIMBURSEMENT REQUEST FOR EXPENDITURES THROUGH Apr 30, 2020

GRANT NAME: Project FUSION: Preparing Special Education Leader
GRANT NUMBER: H325D180021
PRINCIPAL INVESTIGATOR: Plotner, Anthony Jason

BEGIN DATE: 1/1/19
END DATE: 12/31/20

<u>CATEGORY:</u>	<u>BUDGET AMOUNT</u>	<u>CURRENT AMOUNT</u>	<u>CUMULATIVE AMOUNT</u>
1 SALARIES	64,018.00	2,878.60	46,790.77
2 FRINGE BENEFITS	20,726.00	997.41	15,181.51
3 TRAVEL	16,596.00	0.00	2,717.13
4 SUPPLIES	2,744.00	0.00	327.82
5 FIXED CHARGES	382,838.00	0.00	120,427.46
6 CONTRACTUAL SERVICES	4,400.00	0.00	118.20
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
TOTAL DIRECT COST:	\$491,322.00	\$3,876.01	\$185,562.89
INDIRECT COST:	8,678.00	310.07	5,202.80
TOTAL COST:	\$500,000.00	\$4,186.08	\$190,765.69
COST SHARE (IF APPLICABLE):	55,280.00	2,401.34	50,111.31
TOTALS INCLUDING COSTSHARE:	\$555,280.00	\$6,587.42	\$240,877.00

By signing this document, I certify to 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.

Total: 4,186.08



UNIVERSITY OF
SOUTH CAROLINA

Billing Authority: University of South Carolina
Mandy Kibler, Controller

PROJECT ID: 10008822
DEPT ID: 152400

BILLER: Kimberly Welp

Mandy M Kibler
billing@mailbox.sc.edu

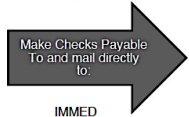


INVOICE NO. CGA0054577

University of South Carolina

May 15, 2020

USDE - Drawdown
USDE - Drawdown
400 Maryland Ave, SW
Washington DC 20202
USA



University of South Carolina
Grants and Funds Management
1600 Hampton Street
Room # 612
Columbia, SC 29208
USA

REIMBURSEMENT REQUEST FOR EXPENDITURES THROUGH Apr 30, 2020

GRANT NAME: Project FUSION: Preparing Special Education Leader
GRANT NUMBER: H325D180021
PRINCIPAL INVESTIGATOR: Plotner, Anthony Jason

BEGIN DATE: 1/1/19
END DATE: 12/31/20

CATEGORY:	BUDGET AMOUNT	CURRENT AMOUNT	CUMULATIVE AMOUNT
1 SALARIES	64,018.00	2,878.60	46,790.77
2 FRINGE BENEFITS	20,726.00	997.41	15,181.51
3 TRAVEL	16,596.00	0.00	2,717.13
4 SUPPLIES	2,744.00	0.00	327.82
5 FIXED CHARGES	382,838.00	0.00	120,427.46
6 CONTRACTUAL SERVICES	4,400.00	0.00	118.20
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
TOTAL DIRECT COST:	\$491,322.00	\$3,876.01	\$185,562.89
INDIRECT COST:	8,678.00	310.07	5,202.80
TOTAL COST:	\$500,000.00	\$4,186.08	\$190,765.69
COST SHARE (IF APPLICABLE):	55,280.00	2,401.34	50,111.31
TOTALS INCLUDING COSTSHARE:	\$555,280.00	\$6,587.42	\$240,877.00

By signing this document, I certify to best of my knowledge disbursements and cash receipts are for the purposes and any false, fictitious, or fraudulent information, or the omission of fraud, false statements, false claims or otherwise.

PROJECT ID: 10008822
DEPT ID: 152400
BILLER: Kimberly Welp

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	64,018.00	2,878.60	46,790.77	17,227.23		17,227.23	35,511.00	28,039.13	7,471.87
FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,080.29	2,993.71
CONTRACTUAL SERVICES	4,400.00		118.20	4,281.80		4,281.80	3,600.00		3,600.00
TRAVEL	16,596.00		2,717.13	13,878.87		13,878.87			
SUPPLIES	2,744.00		327.82	2,416.18		2,416.18			
FIXED CHARGES	382,838.00		45,427.46	337,410.54		337,410.54			
SCHOLARSHIPS NON REPORTABLE			75,000.00	(75,000.00)		(75,000.00)			
DIRECT EXPENSE	491,322.00	3,876.01	185,562.89	305,759.11		305,759.11	51,185.00	37,119.42	14,065.58
INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
INDIRECT EXPENSE	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
TOTAL EXPENSE	500,000.00	4,186.08	190,765.69	309,234.31		309,234.31	55,280.00	50,111.31	5,168.69

Data Review – Project Details

10008822 Project FUSION: Preparing Special Education Leader	USCSP - Grant Project	CON0004269	01/01/2019 - 12/31/2020 [24 months]
SPN0000853 US Department of Education	84.325 Special Education - Personnel Development to Improve Services and Results for Children with Disabilities		H325D180021
PROJECT TEAM			
Role	Name	USCID	Dates
BM	WESSINGER, REBECCA		01/01/2019 - 12/31/2020
CGA	WELP, KIMBERLY		01/01/2019 - 12/31/2020
CPI	Marshall, Kathleen Joan		01/01/2019 - 12/31/2020
CPI	WOLFE, KATHLEEN		01/01/2019 - 12/31/2020
PI	Plotner, Anthony Jason		01/01/2019 - 12/31/2020

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

Data Review – GL Details

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	64,018.00	2,878.60	46,790.77	17,227.23		17,227.23	35,511.00	28,039.13	7,471.87
FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,080.29	2,993.71
CONTRACTUAL SERVICES	4,400.00		118.20	4,281.80		4,281.80	3,600.00		3,600.00
TRAVEL	16,596.00		2,717.13	13,878.87		13,878.87			
SUPPLIES	2,744.00		327.82	2,416.18		2,416.18			
FIXED CHARGES	382,838.00		45,427.46	337,410.54		337,410.54			
SCHOLARSHIPS NON REPORTABLE			75,000.00	(75,000.00)		(75,000.00)			
DIRECT EXPENSE	491,322.00	3,876.01	185,562.89	305,759.11		305,759.11	51,185.00	37,119.42	14,065.58
INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
INDIRECT EXPENSE	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
TOTAL EXPENSE	500,000.00	4,186.08	190,765.69	309,234.31		309,234.31	55,280.00	50,111.31	5,168.69

- 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.

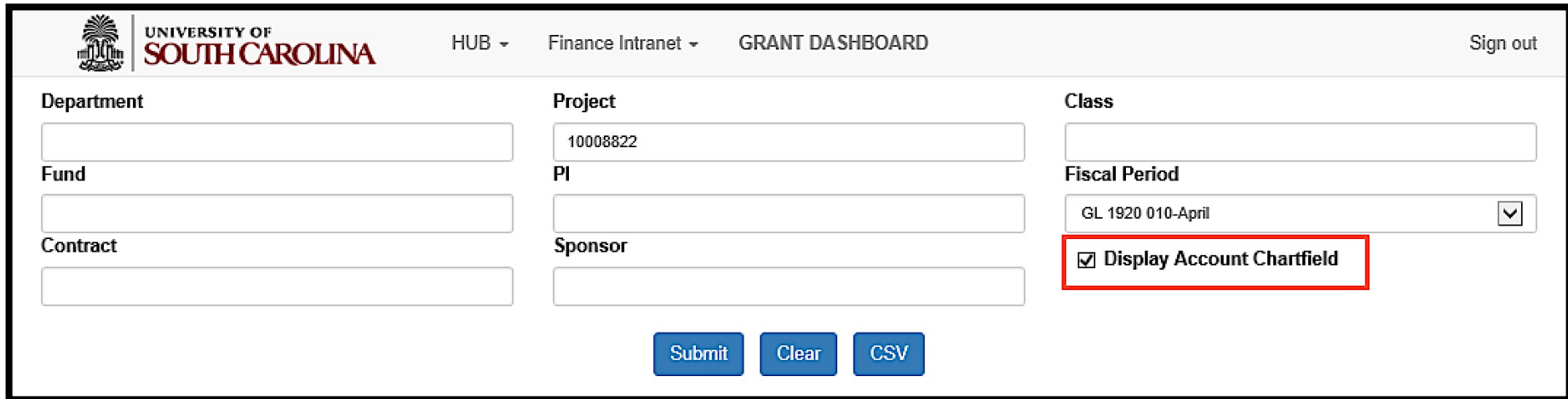
Data Review – Cost Share

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	64,018.00	2,878.60	46,790.77	17,227.23		17,227.23	35,511.00	28,039.13	7,471.87
FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,080.29	2,993.71
CONTRACTUAL SERVICES	4,400.00		118.20	4,281.80		4,281.80	3,600.00		3,600.00
TRAVEL	16,596.00		2,717.13	13,878.87		13,878.87			
SUPPLIES	2,744.00		327.82	2,416.18		2,416.18			
FIXED CHARGES	382,838.00		45,427.46	337,410.54		337,410.54			
SCHOLARSHIPS NON REPORTABLE			75,000.00	(75,000.00)		(75,000.00)			
DIRECT EXPENSE	491,322.00	3,876.01	185,562.89	305,759.11		305,759.11	51,185.00	37,119.42	14,065.58
INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
INDIRECT EXPENSE	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
TOTAL EXPENSE	500,000.00	4,186.08	190,765.69	309,234.31		309,234.31	55,280.00	50,111.31	5,168.69

- 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.



Search Criteria – Display Account Details



The screenshot shows the 'GRANT DASHBOARD' interface. At the top left is the University of South Carolina logo and name. Navigation links include 'HUB', 'Finance Intranet', and 'GRANT DASHBOARD'. A 'Sign out' link is in the top right. The search criteria form is organized into three columns:

- Department:** An empty text input field.
- Fund:** An empty text input field.
- Contract:** An empty text input field.
- Project:** A text input field containing '10008822'.
- PI:** An empty text input field.
- Sponsor:** An empty text input field.
- Class:** An empty text input field.
- Fiscal Period:** A dropdown menu showing 'GL 1920 010-April'.
- Display Account Chartfield:** A checkbox that is checked, highlighted with a red border.

At the bottom of the form are three blue buttons: 'Submit', 'Clear', and 'CSV'.

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

Data Review – Account Details

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	64,018.00			64,018.00		64,018.00	35,511.00		35,511.00
51200 CLASSIFIED EMPLOYEES		1,115.83	2,789.59	(2,789.59)		(2,789.59)			
51300 UNCLASSIFIED EMPLOYEES		1,762.77	35,078.49	(35,078.49)		(35,078.49)	22,344.35	(22,344.35)	
51310 FACULTY, DEANS, ACAD DEPT HEAD			7,076.70	(7,076.70)		(7,076.70)	5,694.78	(5,694.78)	
51330 SUMMER INSTRUCTION			1,845.99	(1,845.99)		(1,845.99)			
51400 NON FED WORK STUDY STUDENTS									
SALARIES	64,018.00	2,878.60	46,790.77	17,227.23		17,227.23	35,511.00	28,039.13	7,471.87
51900 FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,060.29	2,993.71
FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,060.29	2,993.71
52000 CONTRACTUAL SERVICES	4,400.00			4,400.00		4,400.00	3,600.00		3,600.00
52051 PRINTING-USC WORK			118.20	(118.20)		(118.20)			
CONTRACTUAL SERVICES	4,400.00		118.20	4,281.80		4,281.80	3,600.00		3,600.00
52022 STUDENT TRAVEL			1,461.57	(1,461.57)		(1,461.57)			
52024 USC EMPLOYEE TRAVEL DOMESTIC	16,596.00		1,255.56	15,340.44		15,340.44			
TRAVEL	16,596.00		2,717.13	13,878.87		13,878.87			
53000 SUPPLIES	2,744.00			2,744.00		2,744.00			
53004 DATA PROCESSING SUPPLIES			227.82	(227.82)		(227.82)			
53031 COMP SOFTWARE UNDER \$100,000			100.00	(100.00)		(100.00)			
SUPPLIES	2,744.00		327.82	2,416.18		2,416.18			
54520 TUITION/FEE\$-PARTICIPANT\$-NON-									
54525 GRADUATE ASSISTANT TUITION SUP	82,838.00		45,427.46	37,410.54		37,410.54			
54530 STIPEND\$FELLOWSHIP\$-NON REPOR	300,000.00			300,000.00		300,000.00			
FIXED CHARGE\$	382,838.00		45,427.46	337,410.54		337,410.54			
54550 SCHOLARSHIPS NON REPORTABLE			75,000.00	(75,000.00)		(75,000.00)			
SCHOLARSHIPS NON REPORTABLE			75,000.00	(75,000.00)		(75,000.00)			
DIRECT EXPENSE	491,322.00	3,876.01	185,582.89	305,759.11		305,759.11	51,185.00	37,119.42	14,065.58
59990 INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
INDIRECT EXPENSE	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,896.89)
TOTAL EXPENSE	500,000.00	4,186.08	190,785.69	309,234.31		309,234.31	55,280.00	50,111.31	5,168.69

- Select **Display Account Chartfield** to view all accounts listed within each category.
- It gives you the ability to view accounts within each category based on the invoice submitted to the sponsor.
- Useful for when sponsors question expenses.
- Be sure to review expenses and reconcile accounts within 30 days of the project end date.

Data Review – Salaries

GL 2021 010-April as of 02/08/2022 03:17 [28 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	97,475.00			97,475.00		97,475.00	73,186.00		73,186.00
51200 CLASSIFIED EMPLOYEES			15,422.97	(15,422.97)		(15,422.97)			
51300 UNCLASSIFIED EMPLOYEES		2,413.10	66,374.63	(66,374.63)		(66,374.63)		33,951.09	(33,951.09)
51310 FACULTY, DEANS, ACAD DEPT HEAD			7,076.70	(7,076.70)		(7,076.70)		5,694.78	(5,694.78)
51330 SUMMER INSTRUCTION			1,845.99	(1,845.99)		(1,845.99)			
51400 NON FED WORK STUDY STUDENTS									
SALARIES	97,475.00	2,413.10	90,720.29	6,754.71		6,754.71	73,186.00	39,645.87	33,540.13
51900 FRINGE BENEFITS	20,726.00	859.24	29,529.58	(8,803.58)		(8,803.58)	12,074.00	13,592.57	(1,518.57)
51995 FRINGE EXPENSES BUDGET	10,831.00			10,831.00		10,831.00	12,809.00		12,809.00
FRINGE BENEFITS	31,557.00	859.24	29,529.58	2,027.42		2,027.42	24,883.00	13,592.57	11,290.43

- Provides the ability to drill down into the expense activity.
- Click on the expense you want to drill down for more information.



Data Review – Salaries

GL Activity FP = 010 AND REGEXP_LIKE(JOURNAL_STATUS, '[PU]') AND a.ACCOUNT LIKE '51300%' AND (PROJECT LIKE '10008822%' OR OLD_PROJECT LIKE '10008822%')

ACTUAL2021 as of 02/08/2022 03:17

Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source	
CL039-152400-F1000-51300-301-10008822-1- - -	PAY0118590	04/13/2021	04/14/2021	325.16	HR Payroll Journals	>>HCM	PAY
CL039-152400-F1000-51300-301-10008822-1- - -	PAY0118590	04/13/2021	04/14/2021	881.38	HR Payroll Journals	>>HCM	PAY
CL039-152400-F1000-51300-301-10008822-1- - -	PAY0119439	04/28/2021	04/29/2021	1,206.56	HR Payroll Journals	>>HCM	PAY
- TOTAL				(2,413.10)			

NAME	USCID	FISCAL PERIOD :	JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$
Michael Williams	152400	2021-10 :	PAY0119439	152400	152400		04/30/2021	8000661893	04/30/2021	A00000005727	CL039-152400-F1000-301-10008822-	325.16
Michael Williams	152400	2021-10 :	PAY0119439	152400	152400		04/30/2021	8000650024	04/30/2021	A00000005727	CL039-152400-F1000-301-10008822-	587.36
Michael Williams	152400	2021-10 :	PAY0119439	152400	152400		04/30/2021	8000650028	04/30/2021	A00000005727	CL039-152400-F1000-301-10008822-	294.04
TOTAL											1,206.56	

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

Data Review – Expense Details

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
TRAVEL	16,596.00		2,717.13	13,878.87		13,878.87			
53000 SUPPLIES	2,744.00			2,744.00		2,744.00			
53004 DATA PROCESSING SUPPLIES			227.82	(227.82)		(227.82)			
53031 COMP SOFTWARE UNDER \$100,000			100.00	(100.00)		(100.00)			
SUPPLIES	2,744.00		327.82	2,416.18		2,416.18			

GL Activity FP <= 012 AND REGEXP_LIKE(JOURNAL_STATU.S, '[PU]') AND INVOICE_TREE LIKE '%SUPPLIES%' AND (PROJECT LIKE '10008822%' OR OLD_PROJECT LIKE '10008822%')

ACTUAL1920 as of 07/20/2020 02:31		Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
1920-4	CL039-152400-F1000-53004-301-10008822-1- - -	EXA0088005	10/24/2019	10/24/2019	227.82	Expense Accruals	SHT3000042683	EX
	Jenkins, Leslie M.	Jenkins, Leslie M.				PCARD2469216923310077536999-22106008229		
1920-5	CL039-152400-F1000-53031-301-10008822-1- - -	0000089986	11/25/2019	11/26/2019	100.00	TRANSTOTALID: 321059 - PURCHAS	RQ11867	ONL
- TOTAL					(327.82)			

- Provides the ability to drill down into the expense activity.

Grant Dashboard – How to Use the Burn Rates

GL 1920 010-April as of 08/25/2020 02:18 [16 months]										
Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance	
TOTAL EXPENSE	500,000.00	4,186.08	190,765.69	309,234.31		309,234.31	55,280.00	50,111.31	5,168.69	
BURN RATE	(dollars)	20,833.33	11,922.86				COST SHARE RATIO	11.06%	26.27%	
	(%)	4.17%	57.23%							

- 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.

Total Budget/Life of Project
 $500,000 / 24 \text{ months} = 20,833.33$

Life to Date Expenses/Months to Date
 $190,765.69 / 16 \text{ months} = 11,922.86$

Monthly Budget Burn Rate/Total Life to Date Monthly Burn Rate/Monthly Budget Burn Rate

$20,833.33 / 500,000 = 4.17\%$

$11,922.86 / 20,833.33 = 57.23\%$

- Purchasing large pieces of equipment, tuition expenses, etc. can cause spending spikes and the rates to be skewed.



Inactive Project

10007504							*INACTIVE*		
TC3 2C24: Closed -Loop Control of AFP Healing			USC SP - Grant Project		CON0003471		01/01/2017-06/30/2018 [18 months]		
SPN0000849 National Aeronautics & Space Admin			43.002 Aeronautics				NNL09AA00A		
PROJECT TEAM									
Role	Name			USCID	Dates				
CGA	WELP,KIMBERLY			S88921387	01/01/2017 - 06/30/2018				
CGA_OLD	Belk,Lasonya Konnichi Q			G13957034	01/01/2017 - 06/30/2018				
CPI	GURDAL,ZAFER			V37416885	01/01/2017 - 06/30/2018				
CPI	Van Tooren,Michael Johannes L			H97879719	01/01/2017 - 06/30/2018				
PI	HARIK,RAMY			U85158518	01/01/2017 - 06/30/2018				
GL FY 1819 as of 07/15/2020 02:17 [18 months]									
Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	14,111.00		15,253.68	(1,142.68)		(1,142.68)	16,483.00	22,598.15	(6,083.15)
FRINGE BENEFITS			56.44	(56.44)		(56.44)		6,426.37	(6,426.37)
CONTRACTUAL SERVICES			19.15	(19.15)		(19.15)			
TRAVEL			45.45	(45.45)		(45.45)	1,894.00	1,021.18	872.84
SUPPLIES			3,174.83	(3,174.83)		(3,174.83)			
FIXED CHARGES							5,204.00	2,445.32	2,758.68
CAPITALIZED EQUIPMENT	6,126.00			6,126.00		6,126.00	8,875.00		8,875.00
DIRECT EXPENSE	20,237.00		18,549.53	1,687.47		1,687.47	32,458.00	32,459.00	(3.00)
INDIRECT COST RECOVERY	6,582.00		8,249.47	(1,687.47)		(1,687.47)	8,545.00	14,187.47	(5,642.47)
INDIRECT EXPENSE	6,582.00		8,249.47	(1,687.47)		(1,687.47)	8,545.00	14,187.47	(5,642.47)
TOTAL EXPENSE	26,799.00		26,799.00	0.00		0.00	41,001.00	46,648.47	(5,645.47)
BURN RATE	(dollars)	1,488.83	1,488.83	COST SHARE RATIO			152.99%	174.06%	
	(%)	5.56%	100.00%						

Inactive contracts or projects will return as yellow.



Using the Grant Dashboard

- Live Demonstration



Grant Dashboard – Key Take-Aways

- Always select a **Fiscal Period**.
- Use the **Display Account Chartfield** checkbox to view account information.
- Balance should equal the Budget minus the Life to Date Expenses.
- Remember, you can also drill down into any of the expenses including payroll.
- Look at Cost share, the 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.
- The **CGA** role is your **Post Award Accountant (PAA)**.
- All invoicing questions should be routed through your PAA.
- This is the preferred tool when reviewing grants (USCSP projects, 100XXXXX).



GL SUMMARY



Finance Intranet – GL Summary

The screenshot shows the University of South Carolina Finance Intranet interface. At the top left is the university logo and name. Navigation links for 'HUB', 'Finance Intranet', and 'HOME' are in the top center, and a 'Sign out' link is at the top right. The user's name 'Boyd, Tiffany' and email 'PERKINTD@mailbox.sc.edu' are displayed. Below this is a 'Reports' section with a list of links: 'GL Dashboard', 'Grant Dashboard', 'GL Summary', 'GL Activity', and 'Budget Office: Budget to Actual with Prior Year'. The 'GL Summary' link is highlighted with a red rectangular box. To the right of the 'Reports' section is a 'Basic Training Videos' section with a list of video titles.

UNIVERSITY OF SOUTH CAROLINA HUB Finance Intranet HOME Sign out

Boyd, Tiffany
PERKINTD@mailbox.sc.edu as of 03/04/2022 02:44
PERKINTD - [REDACTED]

Reports

- [GL Dashboard](#)
GL Dashboard's intent is to provide a one stop shop, if you are not sure where to start, start here. This report can provide titles for departments, funds, grants - listing of PIs, co-PIs, approvers - current and available balance using budget to actual comparison - detailed monthly statement of transactions ... More functionality is planned in future either added to this report or as a separate report. NOTE: This report currently only provides balance information, but does allow you to drill down to the GL Activity Report which has detail.
- [Grant Dashboard](#)
Grant Dashboard
- [GL Summary](#)
GL Summary's intent is to provide a more advanced reporting view to allow users to filter, group and burst summary data. Also providing drill down to the GL Activity Report which has detail.
- [GL Activity](#)
GL Activity's intent is to provide the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level. Also attempting to provide drill down capability when available into PeopleSoft to view further information on each transaction. Note when a paper-clip icon displays, it is indicating that there is a supporting attachment on that transaction.
- [Budget Office: Budget to Actual with Prior Year](#)
Budget Office report of Budget to Actual with Prior Year Period. Most meaningful for A accounts, it provides a high-level balance of Budget, Actual, Percent of Budget Remaining, Prior Year Period Actual and Change, difference between current and prior year period actuals in dollars and percent.

Basic Training Videos

- [What is finance intranet?](#)
- [Where is finance intranet?](#)
- [How do I access finance intranet?](#)
- [Not sure where to start?](#)
- [Start with chartfield value.](#)
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- [Who is on my grant team?](#)
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- [What was my prior period balance?](#)
- [How do I bookmark and share?](#)

GL Summary – Search Criteria

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

The screenshot shows the 'GL SUMMARY' search interface. At the top, it includes the University of South Carolina logo, navigation links for 'HUB', 'Finance Intranet', and 'GL SUMMARY', and a 'Sign out' link. The form is organized into three columns:

- Left Column (Search Criteria):** Fields for Operating Unit, Department (130200), Fund (F1000), Fund Group, Class, Account (5202%), Account Type, Account Category, Account Subcategory, and Account Tree.
- Middle Column (Product (Term)):** Fields for Project BU, Project, Activity, CFDA, Contract, Sponsor, State Project, and Special Filter (set to None). A checkbox for 'Show BUD000' is also present.
- Right Column (Summary Options):** A series of dropdown menus for 'Total 1' through 'Total 7', 'Burst', and 'Fiscal Period' (set to GL 2122 008-February).

At the bottom of the form are three buttons: 'Submit', 'Clear', and 'CSV'.

Search By:

- Department/Fund, Department/Fund/Account, Project, etc.
- Total, Sub-Total, or Burst
- Select a Fiscal Period

GL Summary – Data Review

GL Summary							
DEPARTMENT LIKE '130200%' AND FUND LIKE 'F1000%' AND a.ACCOUNT LIKE '5202%' AND substr('000' a.FP, -3,3) <= '008'							
GL 2122 008-February as of 03/03/2022 03:34	Actual Open Balance	Life to Date Budget	Current Month Actual	Fiscal Year Actual	Life to Date Actual	Pre Enc.	Enc.
52024 USC EMPLOYEE TRAVEL DOMESTIC	141,697.50	502,159.00		21,887.91	163,585.41		2,740.00
5 DIRECT EXPENSE	141,697.50	502,159.00		21,887.91	163,585.41		2,740.00
F1000 FEDERAL GRANT	(141,697.50)	(502,159.00)		(21,887.91)	(163,585.41)		(2,740.00)
52024 USC EMPLOYEE TRAVEL DOMESTIC	141,697.50	502,159.00		21,887.91	163,585.41		2,740.00
130200 CHEMISTRY & BIOCHEMISTRY							

GL Summary							
DEPARTMENT LIKE '130200%' AND FUND LIKE 'F1000%' AND a.ACCOUNT LIKE '5202%' AND substr('000' a.FP, -3,3) <= '008'							
GL 2122 008-February as of 03/03/2022 03:34	Actual Open Balance	Life to Date Budget	Current Month Actual	Fiscal Year Actual	Life to Date Actual	Pre Enc.	Enc.
52025 USC EMPLOYEE TRAVEL FOREIGN	12,754.22	114,781.00			12,754.22		
5 DIRECT EXPENSE	12,754.22	114,781.00			12,754.22		
F1000 FEDERAL GRANT	(12,754.22)	(114,781.00)			(12,754.22)		
52025 USC EMPLOYEE TRAVEL FOREIGN	12,754.22	114,781.00			12,754.22		
130200 CHEMISTRY & BIOCHEMISTRY							

- In this example, Total 2 (Account) was used to Burst or summarize the data for 130200 F Funds for February FY 2122.
- The “%” sign was used to pull in all the travel accounts.

GL Summary – Data Review

GL Summary							
DEPARTMENT LIKE '130200%' AND FUND LIKE 'F1000%' AND a.ACCOUNT LIKE '5202%' AND substr('000' a.FP, -3,3) <= '009'							
GL-Current [OPEN] as of 03/09/2022 03:34	Actual Open Balance	Life to Date Budget	Current Month Actual	Fiscal Year Actual	Life to Date Actual	Pre Enc.	Enc.
52020 TRAVEL			1,850.00	1,850.00	1,850.00		
52021 NON USC EMPLOY TRAVEL CONSULTA	9,716.43				9,716.43		
52022 STUDENT TRAVEL	67,470.15			16,760.11	84,230.26		
52023 EMPLOYMENT INTERVIEW TRAVEL	122.09				122.09		
52024 USC EMPLOYEE TRAVEL DOMESTIC	141,697.50	507,661.00	511.68	22,399.59	164,097.09		6,004.00
52025 USC EMPLOYEE TRAVEL FOREIGN	12,754.22	114,781.00			12,754.22		
130200 CHEMISTRY & BIOCHEMISTRY	(231,760.39)	(622,442.00)	(2,361.68)	(41,009.70)	(272,770.09)		(6,004.00)

- In this example, Total 1 (Department) was used to Burst or summarize the data for 130200 F Funds for February FY 1920.
- The “%” sign was used to pull in all the travel accounts.

Using the GL Summary

- Live Demonstration



GL Summary – Key Take-Aways

- Always select a **Fiscal Period**.
- Use the **Display Account Chartfield** checkbox to view account information.
- For A funds, life to date expenses equal fiscal year to date.
- For non-A funds, the life to date is the true life of the fund.
- For grant projects, life to date amounts reflect true life to date expenses.
- Use the percent sign (%) to pull in additional search values.
- You can drill down into any of the expenses including payroll.
- Use the Grant Dashboard when reviewing grants.



GL ACTIVITY



UNIVERSITY OF
SOUTH CAROLINA

Finance Intranet – GL Activity



BOYD, TIFFANY

PERKINTD@mailbox.sc.edu as of 08/20/2020 01:47

PERKINTD - [REDACTED]

Reports

- [GL Dashboard](#)

GL Dashboard's intent is to provide a one stop shop, if you are not sure where to start, start here. This report can provide titles for departments, funds, grants - listing of PIs, co-PIs, approvers - current and available balance using budget to actual comparison - detailed monthly statement of transactions ... More functionality is planned in future either added to this report or as a separate report. NOTE: This report currently only provides balance information, but does allow you to drill down to the GL Activity Report which has detail.

- [Grant Dashboard](#)

Grant Dashboard.

- [GL Summary](#)

GL Summary's intent is to provide a more advanced reporting view to allow users to filter, group and burst summary data. Also providing drill down to the GL Activity Report which has detail.

- [GL Activity](#)

GL Activity's intent is to provide the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level. Also attempting to provide drill down capability when available into PeopleSoft to view further information on each transaction. Note when a paper-clip icon displays, it is indicating that there is a supporting attachment on that transaction.

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GL Activity – Search Criteria

Provides the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level.

UNIVERSITY OF SOUTH CAROLINA HUB ▾ Finance Intranet ▾ GL ACTIVITY Sign out

Journal ID
[Text Field]

Journal Date (m/d/y)
[Text Field] to [Text Field]

Post Date (m/d/y)
[Text Field] to [Text Field]

Line Description
[Text Field]

Line Reference
[Text Field]

Line Reference Name
[Text Field]

Line Amount
[Text Field] to [Text Field]

Journal Source
[Text Field]

Journal Status
--On Ledger-- ▾

Measure
ACTUAL MTD ▾

Operating Unit
[Text Field]

Department
[Text Field]

Fund
Z0171

Fund Group
[Text Field]

Class
[Text Field]

Account
5%

Account Type
[Text Field]

Account Category
[Text Field]

Account Subcategory
[Text Field]

Account Tree
[Text Field]

Account Subtype
[Text Field]

Show Additional Reference Info

Product
[Text Field]

Project BU
[Text Field]

Project
[Text Field]

Activity
[Text Field]

CFDA
[Text Field]

Contract
[Text Field]

Sponsor
[Text Field]

State Project
[Text Field]

Costshare
[Text Field]

Special Filter
None ▾

Invoice Tree
[Text Field]

Show BUD000

Total 1
Department ▾

Total 2
Account ▾

Total 3
None ▾

Total 4
None ▾

Total 5
None ▾

Total 6
None ▾

Total 7
None ▾

Burst
Total 1 ▾

Sort
Post Date ▾

Fiscal Period
GL 2122 008-February ▾

Submit **Clear** **CSV**



GL Activity – Data Review

GL Activity

FP = 008 AND REGEXP_LIKE(JOURNAL_STATUS, 'PUJ') AND FUND LIKE 'Z0171%' AND a.ACCOUNT LIKE '5%'

ACTUAL2122 as of 03/09/2022 03:56

Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
CL000-620800-Z0171-52030-990- - - - -	02/03/2022	02/07/2022	(592.66)	DoIT 21 Dec	RQ12877	ONL
CL000-620800-Z0171-52030-990- - - - -	02/03/2022	02/07/2022	592.66	DoIT 22 Jan	RQ1877	ONL
CL000-620800-Z0171-52030-990- - - - -	02/28/2022	02/28/2022	592.66	DoIT 22 Feb	RQ2877	ONL
52030 TELEPHONE AND NETWORK			592.66			
CL000-620800-Z0171-52032-990- - - - -	02/03/2022	02/07/2022	(134.27)	DoIT 21 Dec	RQ12877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/03/2022	02/07/2022	(50.00)	DoIT 21 Dec	RQ12877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/03/2022	02/07/2022	50.00	DoIT 22 Jan	RQ1877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/03/2022	02/07/2022	252.39	DoIT 22 Jan	RQ1877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/03/2022	02/07/2022	134.39	DoIT 22 Jan	RQ1877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/03/2022	02/07/2022	(488.39)	DoIT 21 Dec	RQ12877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/28/2022	02/28/2022	1,769.14	DoIT 22 Feb	RQ2877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/28/2022	02/28/2022	252.39	DoIT 22 Feb	RQ2877	ONL
CL000-620800-Z0171-52032-990- - - - -	02/28/2022	02/28/2022	50.00	DoIT 22 Feb	RQ2877	ONL
52032 TELEPHONE & NETWORK SERVICES			1,835.65			
CL000-620800-Z0171-53003-990- - - - -	02/28/2022	03/02/2022	82.11	FEBRUARY 2022 MONTHLY POSTAL S		ONL
53003 POSTAGE			82.11			
620800 UNIVERSITY FOUNDATIONS			(2,510.42)			



Using the GL Activity

- Live Demonstration



GL Activity – Key Take-Aways

- Always select a **Fiscal Period**.
- This is the drill down activity.
- Hyperlinks will take you to PeopleSoft or HCM Distribution.
- Look up specific transactions using Journal IDs.
- Use line description and reference to help search for transactions
- Total, Sub-total, and burst options are also available.
- You can select a date range to pull transaction activity.



HCM DISTRIBUTION



UNIVERSITY OF
SOUTH CAROLINA

The HUB – HCM Distribution

The screenshot shows the top navigation bar with the University of South Carolina logo and name on the left, and 'HUB', 'HCM DISTRIBUTION', and 'HOME' menu items in the center. A 'Sign out' link is on the right. Below the navigation, the user's name 'BOYD, TIFFANY' and email 'PERKINTD@mailbox.sc.edu' are displayed, along with a timestamp 'as of 08/20/2020 01:47'. The main content area is divided into two sections: 'Main Navigation' and 'Info'. The 'Main Navigation' section contains a list of links, with 'HCM Payroll Distribution Search' highlighted by a red box. Below this link is a description: 'Search displaying HCM Payroll Accounting Distribution Data'. Other links include 'Payroll Expenditure Report', 'Fringe Benefit Summary Report', 'Employee Analysis', and 'Employee Analysis by USCID', each with a brief description. The 'Info' section contains a single bullet point: 'HCM Distribution Group required to view this page.'

UNIVERSITY OF SOUTH CAROLINA HUB HCM DISTRIBUTION HOME Sign out

BOYD, TIFFANY
PERKINTD@mailbox.sc.edu as of 08/20/2020 01:47
PERKINTD - [REDACTED]

Main Navigation

- HCM Payroll Distribution Search**
Search displaying HCM Payroll Accounting Distribution Data
- [Payroll Expenditure Report](#)
Search by Pay Period and Chartfields.
- [Fringe Benefit Summary Report](#)
Search by Pay Period and Chartfields.
- [Employee Analysis](#)
Search by Pay Period and Chartfields.
- [Employee Analysis by USCID](#)
Search by Pay Period and Employee.

Info

- HCM Distribution Group required to view this page.



HCM Distribution – Search Criteria

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

The screenshot shows the HCM Distribution Search interface. The header includes the University of South Carolina logo and navigation tabs for HUB, HCM DISTRIBUTION, and HCM DISTRIBUTION SEARCH. The search form contains various input fields and dropdown menus, with several fields highlighted by red boxes. At the bottom, there are buttons for Submit, Clear, and CSV.

Field	Value
USCID	
Name	
Job	
HCM Dept.	
Journal	
Check	
Check Date (m/d/y)	
Pay Group	
Pay End Date (m/d/y)	
Earn End Date (m/d/y)	
Dist.Status	ALL
Dist.Type	ALL
Dist.Class	ALL
Dist.Code	
Combo	
Operating Unit	
Department	
Fund	
Class	
Account	
Project BU	
Project	
CFDA	
Contract	
Sponsor	
Costshare	
From Pay Period	ALL
To Pay Period	ALL
Fiscal Month	ALL
Fiscal Year	ALL
Pay Run ID	
Num of Records	10000
Order By	Chartfield,Name
Total	<input type="checkbox"/>
Sub-Total	<input type="checkbox"/>
Detail	<input checked="" type="checkbox"/>
Sum.Adjustments	<input type="checkbox"/>
Output	Fringe-Summary[Hor]

Search By:

- Operating Unit, Department, Account Code, Earn Code (Dist.Code), Employee, Project, or Cost Share
- Search by from/to pay periods, fiscal month, and/or fiscal year

HCM Distribution - Search Criteria

Records Found: 26,672

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %	TAX	RETIRE	LIFE	LTD	HEALTH	DENTAL	FRNG \$	FRNG %	TOT \$
		1920-6 : PAY0090869	SGTA	100300	T12	12/15/2019	8000226938	12/13/2019	A00000018998	CL071-100300-A0001-202-	552.06	100.00%								0.00%	552.06
		1920-6 : PAY0091560	SGTA	100300	T12	12/31/2019	8000243093	12/23/2019	A00000018998	CL071-100300-A0001-202-	552.06	100.00%								0.00%	552.06
		1920-6 : PAY0090869	SFWR	100300	HRL	12/15/2019	8000220346	12/13/2019	A00000023110	CL071-100300-A0001-202-	42.50	25.00%								0.00%	42.50
		1920-6 : PAY0091560	SFWR	100300	HRL	12/31/2019	8000236469	12/23/2019	A00000023110	CL071-100300-A0001-202-	29.75	25.00%								0.00%	29.75
		1920-6 : PAY0090869	UG76	135900	C09	12/15/2019	8000214438	12/13/2019	A00000006656	CL071-100300-A0001-202-	5,922.12	100.00%	427.35	1,291.61	0.22	2.15	531.79	8.99	2,262.11	38.20%	8,184.23
		1920-6 : PAY0091560	UG76	135900	C09	12/31/2019	8000230674	12/23/2019	A00000006656	CL071-100300-A0001-202-	5,922.12	100.00%	427.35	1,291.61	0.22	2.15	531.79	8.99	2,262.11	38.20%	8,184.23
		1920-6 : PAY0090869	UG70	100300	T12	12/15/2019	8000226939	12/13/2019	A00000027225	CL071-100300-A0001-202-	1,111.11	100.00%	85.00	242.33					327.33	29.46%	1,438.44
		1920-6 : PAY0091560	UG70	100300	T12	12/31/2019	8000243094	12/23/2019	A00000027225	CL071-100300-A0001-202-	1,111.11	100.00%	85.00	242.33					327.33	29.46%	1,438.44
		1920-6 : PAY0090869	UG70	100300	T12	12/15/2019	8000229875	12/13/2019	A00000027225	CL071-100300-A0001-202-	4,853.80	100.00%	365.92	1,058.61	0.22	2.15	268.47	8.99	1,704.36	35.11%	6,558.16
		1920-6 : PAY0091560	UG70	100300	T12	12/31/2019	8000246044	12/23/2019	A00000027225	CL071-100300-A0001-202-	4,853.80	100.00%	365.93	1,058.61	0.22	2.15	268.47	8.99	1,704.37	35.11%	6,558.17
		1920-6 : PAY0090869	SGIA	100300	T12	12/15/2019	8000226940	12/13/2019	A00000018998	CL071-100300-A0001-202-	697.40	100.00%								0.00%	697.40
		1920-6 : PAY0091560	SGIA	100300	T12	12/31/2019	8000243095	12/23/2019	A00000018998	CL071-100300-A0001-202-	697.40	100.00%								0.00%	697.40
		1920-6 : PAY0090869	SGTA	100300	T12	12/15/2019	8000229859	12/13/2019	A00000018998	CL071-100300-A0001-202-	184.00	20.56%								0.00%	184.00
		1920-6 : PAY0091560	SGTA	100300	T12	12/31/2019	8000246027	12/23/2019	A00000018998	CL071-100300-A0001-202-	184.00	20.56%								0.00%	184.00
		1920-6 : PAY0090869	SGIA	100300	I12	12/15/2019	8000225156	12/13/2019	A00000018998	CL071-100300-A0001-202-	736.11	100.00%								0.00%	736.11
		1920-6 : PAY0091560	SGIA	100300	I12	12/31/2019	8000241320	12/23/2019	A00000018998	CL071-100300-A0001-202-	736.11	100.00%								0.00%	736.11

This example is showing payroll for operating unit CL071, by employee, for fiscal month December using the Default Output of "Fringe-Summary(Horizontal)"



HCM Distribution – Search Criteria

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %	TAX	RETIRE	LIFE	LTD	HEALTH	DENTAL	FRNG \$	FRNG %	TOT \$
		1920-1 : PAY0082306	UG80	185000	C12	07/15/2019	8000080772	07/15/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-1 : PAY0082306	UG80	185000	C12	07/31/2019	8000091406	07/31/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-2 : PAY0083462	UG80	185000	C12	08/15/2019	8000101628	08/15/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-2 : PAY0084368	UG80	185000	C12	08/31/2019	8000113308	08/30/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.48	334.96					452.44	29.46%	1,988.23
		1920-3 : PAY0085095	UG80	185000	C12	09/15/2019	8000131271	09/13/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-3 : PAY0086211	UG80	185000	C12	09/30/2019	8000139175	09/30/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-4 : PAY0087294	UG80	185000	C12	10/15/2019	8000153208	10/15/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-4 : PAY0088327	UG80	185000	C12	10/31/2019	8000168894	10/31/2019	A00000034158	MC000-180000- F1000-301-10009070-	2,135.79	100.00%	163.39	334.96					498.35	23.33%	2,634.14
		1920-5 : PAY0089704	UG80	185000	C12	11/15/2019	8000184700	11/15/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.48	334.96					452.44	29.46%	1,988.23
		1920-5 : PAY0090154	UG80	185000	C12	11/30/2019	8000200915	11/27/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-6 : PAY0090869	UG80	185000	C12	12/15/2019	8000217310	12/13/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-6 : PAY0091560	UG80	185000	C12	12/31/2019	8000233549	12/23/2019	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-7 : PAY0092452	UG80	185000	C12	01/15/2020	8000249825	01/15/2020	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
		1920-7 : PAY0093458	UG80	185000	C12	01/31/2020	8000263753	01/31/2020	A00000034158	MC000-180000- F1000-301-10009070-	1,535.79	100.00%	117.49	334.96					452.45	29.46%	1,988.24
											22,101.06		1,690.74	4,689.44					6,380.18	28.87%	28,481.24

This example is showing payroll, by employee, for a specific project (10009070) for fiscal year 'ALL'.



Other Ways to View Data

UNIVERSITY OF SOUTH CAROLINA HUB HCM DISTRIBUTION HCM DISTRIBUTION SEARCH Sign out

USCID:

Pay Group:

Combo:

Project BU:

From Pay Period: 09/15/2019

To Pay Period: 12/31/2019

Fiscal Month:

Fiscal Year: 2019-2020

Pay Run ID:

Num of Records: 10000

Order By: Chartfield,Name

Total

Sub-Total

Detail

Sum.Adjustments

Output: Fringe-Summary(Horiz)

Submit Clear CSV

By Sum.
Adjustments
Unchecked

Records Found: 18

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %	TAX	RETIRE	LIFE	LTD	HEALTH	DENTAL	FRNG \$	FRNG %	TOT \$
		1920-3 : PAY0085095	SGIA	126100	T12	09/15/2019	7000002748	09/13/2019	A00000019094	CL071-126100-A0001-101--	611.11	00.00%									611.11
		1920-6 : RPAY000012	SGIA	126100	T12	09/15/2019	RPAY000012	12/11/2019	A00000019094	CL071-126100-A0001-101--	(611.11)	-00.00%									(611.11)
		1920-3 : PAY0086211	SGIA	126100	T12	09/30/2019	7000003481	09/30/2019	A00000019094	CL071-126100-A0001-101--	611.11	00.00%									611.11
		1920-6 : RPAY000012	SGIA	126100	T12	09/30/2019	RPAY000012	12/11/2019	A00000019094	CL071-126100-A0001-101--	(611.11)	-00.00%									(611.11)
		1920-4 : PAY0087294	SGIA	126100	T12	10/15/2019	8000162960	10/15/2019	A00000019094	CL071-126100-A0001-101--	611.11	00.00%									611.11
		1920-6 : RPAY000012	SGIA	126100	T12	10/15/2019	RPAY000012	12/11/2019	A00000019094	CL071-126100-A0001-101--	(611.11)	-00.00%									(611.11)
		1920-4 : PAY0088327	SGIA	126100	T12	10/31/2019	8000178754	10/31/2019	A00000019094	CL071-126100-A0001-101--	611.11	00.00%									611.11
		1920-6 : RPAY000012	SGIA	126100	T12	10/31/2019	RPAY000012	12/11/2019	A00000019094	CL071-126100-A0001-101--	(611.11)	-00.00%									(611.11)
		1920-5 : PAY0089704	SGIA	126100	T12	11/15/2019	8000194968	11/15/2019	A00000019094	CL071-126100-A0001-101--	611.11	00.00%									611.11
		1920-6 : RPAY000012	SGIA	126100	T12	11/15/2019	RPAY000012	12/11/2019	A00000019094	CL071-126100-A0001-101--	(611.11)	-00.00%									(611.11)
		1920-5 : PAY0090154	SGIA	126100	T12	11/30/2019	8000211336	11/27/2019	A00000019094	CL071-126100-A0001-101--	611.11	100.00%									611.11
		1920-6 : PAY0090869	SGIA	126100	T12	12/15/2019	8000227633	12/13/2019	A00000019094	CL071-126100-A0001-101--	611.11	100.00%									611.11
		1920-6 : PAY0091560	SGIA	126100	T12	12/31/2019	8000243794	12/23/2019	A00000019094	CL071-126100-A0001-101--	611.11	100.00%									611.11
		1920-6 : RPAY000012	SGIA	126100	T12	11/15/2019	RPAY000012	12/11/2019	A00000019109	CL071-126490-A0001-101--	3,055.55	500.00%									3,055.55
TOTAL											4,888.88									0.00%	4,888.88



Other Ways to View Data

UNIVERSITY OF SOUTH CAROLINA HUB HCM DISTRIBUTION HCM DISTRIBUTION SEARCH Sign out

USCID: [Redacted]

From Pay Period: 09/15/2019

To Pay Period: 12/31/2019

Sum.Adjustments:

Output: Fringe-Summary(Horiz)

Submit Clear CSV

By Sum.
Adjustments
Checked

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %	TAX	RETIRE	LIFE	LTD	HEALTH	DENTAL	FRNG \$	FRNG %	TOT \$	
		1920-6 : RPAY000012	SGIA	126100	T12	09/15/2019	7000002748	12/11/2019	A00000019094	CL071-126100-A0001-101--		0.00%									0.00%	
		1920-6 : RPAY000012	SGIA	126100	T12	09/30/2019	7000003481	12/11/2019	A00000019094	CL071-126100-A0001-101--		0.00%									0.00%	
		1920-6 : RPAY000012	SGIA	126100	T12	10/15/2019	8000162960	12/11/2019	A00000019094	CL071-126100-A0001-101--		0.00%									0.00%	
		1920-6 : RPAY000012	SGIA	126100	T12	10/31/2019	8000178754	12/11/2019	A00000019094	CL071-126100-A0001-101--		0.00%									0.00%	
		1920-6 : RPAY000012	SGIA	126100	T12	11/15/2019	8000194968	12/11/2019	A00000019094	CL071-126100-A0001-101--		0.00%									0.00%	
		1920-5 : PAY0090154	SGIA	126100	T12	11/30/2019	8000211336	11/27/2019	A00000019094	CL071-126100-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : PAY0090869	SGIA	126100	T12	12/15/2019	8000227633	12/13/2019	A00000019094	CL071-126100-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : PAY0091560	SGIA	126100	T12	12/31/2019	8000243794	12/23/2019	A00000019094	CL071-126100-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : RPAY000012	SGIA	126100	T12	09/15/2019	7000002748	12/11/2019	A00000019109	CL071-126490-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : RPAY000012	SGIA	126100	T12	09/30/2019	7000003481	12/11/2019	A00000019109	CL071-126490-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : RPAY000012	SGIA	126100	T12	10/15/2019	8000162960	12/11/2019	A00000019109	CL071-126490-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : RPAY000012	SGIA	126100	T12	10/31/2019	8000178754	12/11/2019	A00000019109	CL071-126490-A0001-101--	611.11	100.00%									0.00%	611.11
		1920-6 : RPAY000012	SGIA	126100	T12	11/15/2019	8000194968	12/11/2019	A00000019109	CL071-126490-A0001-101--	611.11	100.00%									0.00%	611.11
TOTAL											4,888.88									0.00%	4,888.88	



Other Ways to View Data

UNIVERSITY OF SOUTH CAROLINA HUB HCM DISTRIBUTION HCM DISTRIBUTION SEARCH Sign out

USCID: [Redacted]

Name: [Redacted]

Job: [Redacted]

HCM Dept.: [Redacted]

Journal: [Redacted]

Check: [Redacted]

Check Date (mid/y): [Redacted]

Pay Group: [Redacted]

Pay End Date (mid/y): [Redacted]

Earn End Date (mid/y): [Redacted]

Dist. Status: [Redacted]

Dist. Type: [Redacted]

Dist. Class: [Redacted]

Dist. Code: [Redacted]

Operating Unit: [Redacted]

Department: [Redacted]

Fund: [Redacted]

Class: [Redacted]

Account: [Redacted]

Project BU: [Redacted]

Project: [Redacted]

CFDA: [Redacted]

Contract: [Redacted]

Sponsor: [Redacted]

Costshare: [Redacted]

From Pay Period: ALL

To Pay Period: ALL

Fiscal Month: JANUARY [Redacted]

Fiscal Year: 2019-2020

Pay Run ID: [Redacted]

Num of Records: 10000

Order By: Chartfield.Name

Total

Sub-Total

Detail

Sum Adjustments

Output: Fringe-Detail[Vertical] [Redacted]

Submit Clear CSV

Output – Fringe Detail (Vertical)

NAME	USCID	JOB	HCM DEPT	GROUP	PAY PERIOD	COMBO	CHARTFIELD	AMOUNT
	ACCOUNT	EARN END	DIST. TYPE: CODE	CHECK : CHK DATE	FISCAL PERIOD : JOURNAL			
	AD30	620500	C12	01/15/2020	A0000000687	CL010-620500-A0001-602--		
1	51200	01/04/2020	ERN-HOL-Holiday Pay	PAY0092452 : 01/07/2020	1920-7:PAY0092452		323.85	
2	51200	01/15/2020	ERN-REG-Regular Pay	PAY0092452 : 01/07/2020	1920-7:PAY0092452		3182.60	
3	51900	01/15/2020	DED-BASLIF-Basic Life	PAY0092452 : 01/07/2020	1920-7:PAY0092452		0.16	
4	51900	01/15/2020	DED-BASLTD-Basic Long Term Disability	PAY0092452 : 01/07/2020	1920-7:PAY0092452		1.61	
5	51900	01/15/2020	DED-DENTAL-Dental	PAY0092452 : 01/07/2020	1920-7:PAY0092452		6.74	
6	51900	01/15/2020	DED-HEALTH-Health	PAY0092452 : 01/07/2020	1920-7:PAY0092452		309.03	
7	51900	01/15/2020	DED-SORPT-ORP TIAA-CREF	PAY0092452 : 01/07/2020	1920-7:PAY0092452		589.40	
8	51900	01/15/2020	DED-TIAAER-TIAA ORP ER 5%	PAY0092452 : 01/07/2020	1920-7:PAY0092452		175.31	
9	51900	01/15/2020	TAX-E-OASDI/Disability - ER	PAY0092452 : 01/07/2020	1920-7:PAY0092452		205.12	
10	51900	01/15/2020	TAX-Q-FICA Med Hospital Ins / ER	PAY0092452 : 01/07/2020	1920-7:PAY0092452		47.97	
LABOR: 3,506.25 (100.00%)							FRINGE: 1,335.34 (38.08%)	4,841.59
	AD30	620500	C12	01/31/2020	A0000000687	CL010-620500-A0001-602--		
11	51200	01/31/2020	ERN-REG-Regular Pay	PAY0093458 : 01/23/2020	1920-7:PAY0093458		3506.25	
12	51900	01/31/2020	DED-BASLIF-Basic Life	PAY0093458 : 01/23/2020	1920-7:PAY0093458		0.16	
13	51900	01/31/2020	DED-BASLTD-Basic Long Term Disability	PAY0093458 : 01/23/2020	1920-7:PAY0093458		1.61	
14	51900	01/31/2020	DED-DENTAL-Dental	PAY0093458 : 01/23/2020	1920-7:PAY0093458		6.74	
15	51900	01/31/2020	DED-HEALTH-Health	PAY0093458 : 01/23/2020	1920-7:PAY0093458		309.03	
16	51900	01/31/2020	DED-SORPT-ORP TIAA-CREF	PAY0093458 : 01/23/2020	1920-7:PAY0093458		589.40	
17	51900	01/31/2020	DED-TIAAER-TIAA ORP ER 5%	PAY0093458 : 01/23/2020	1920-7:PAY0093458		175.31	
18	51900	01/31/2020	TAX-E-OASDI/Disability - ER	PAY0093458 : 01/23/2020	1920-7:PAY0093458		205.12	
19	51900	01/31/2020	TAX-Q-FICA Med Hospital Ins / ER	PAY0093458 : 01/23/2020	1920-7:PAY0093458		47.97	
LABOR: 3,506.25 (100.00%)							FRINGE: 1,335.34 (38.08%)	4,841.59
LABOR:	7,012.50		FRINGE:	2,670.68 (38.08%)	TOTAL:	9,683.18		



Other Ways to View Data

UNIVERSITY OF SOUTH CAROLINA HUB HCM DISTRIBUTION HCM DISTRIBUTION SEARCH Sign out

USCID: Pay Group: Combo: Project BU: From Pay Period: ALL To Pay Period: ALL Fiscal Month: JANUARY Fiscal Year: 2019-2020 Num of Records: 10000 Order By: Chartfield Name

Name: Pay End Date (m/d/y): to Operating Unit: Project: Total Sub-Total Detail Sum Adjustments

Job: Earn End Date (m/d/y): to Department: 120400 CFDA: Fiscal Year: 2019-2020 Pay Run ID: Output: Fringe-Total Only

HCM Dept.: Dist.Status: ALL Fund: A0001 Contract: Journal: Dist.Type: ALL Class: Sponsor: Check: Dist.Class: ALL Account: Costshare: Check Date (m/d/y): to Dist.Code:

Submit Clear CSV

Output – Fringe Total Only

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %	FRNG \$	FRNG %	TOTAL \$
		1920-7 : PAY0092452	UG70	120400	HRL	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	361.06	20.61%	106.36	29.46%	467.42
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	131.87	4.24%	47.53	36.04%	179.40
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	5.74%	65.16	35.94%	246.48
		1920-7 : PAY0092452	UG70	120400	T12	01/15/2020	PAY0092452	01/07/2020	A00000027167	CL067-120400-A0001-101-	320.29	91.43%	94.35	29.46%	414.64
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	131.87	2.00%	42.81	32.46%	174.68
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	2.72%	58.81	32.43%	240.13
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	131.87	5.52%	50.16	38.04%	182.03
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	7.44%	68.63	37.85%	249.95
		1920-7 : PAY0092452	UG70	120400	HRL	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	359.46	18.37%	105.90	29.46%	465.36
		1920-7 : PAY0092452	AH40	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000002484	CL067-120400-A0001-101-	2,414.21	100.00%	1,020.02	42.25%	3,434.23
		1920-7 : PAY0093458	AH40	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000002484	CL067-120400-A0001-101-	2,414.21	100.00%	1,020.03	42.25%	3,434.24
		1920-7 : PAY0092452	UG70	120400	HRL	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	353.86	17.51%	104.24	29.46%	458.10
		1920-7 : PAY0092452	UG70	120400	T12	01/15/2020	PAY0092452	01/07/2020	A00000027167	CL067-120400-A0001-101-	75.07	3.10%	228.39	304.24%	303.46
		1920-7 : PAY0093458	UG70	120400	T12	01/15/2020	PAY0093458	01/23/2020	A00000027167	CL067-120400-A0001-101-	131.87	5.44%	38.74	29.38%	170.61
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	140.66	2.40%	46.50	33.06%	187.16
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	193.41	3.28%	63.82	33.00%	257.23
		1920-7 : PAY0091883	AH40	120400	C12	12/23/2019	PAY0091883	12/23/2019	A00000002484	CL067-120400-A0001-101-	132.21	100.00%	132.21	100.00%	264.42
		1920-7 : PAY0092452	UG70	120400	C09	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	131.87	2.81%	56.92	43.16%	188.79
		1920-7 : PAY0093458	UG70	120400	C09	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	3.82%	78.02	43.03%	259.34
TOTAL											99,776.44		37,633.12	37.72%	137,409.56



Other Ways to View Data

UNIVERSITY OF SOUTH CAROLINA HUB HCM DISTRIBUTION HCM DISTRIBUTION SEARCH Sign out

USCID: Pay Group: Combo: Project BU: From Pay Period: ALL To Pay Period: ALL Num of Records: 10000

Name: Pay End Date (m/d/y): to Operating Unit: Project: Order By: Charfield,Name

Job: Earn End Date (m/d/y): to Department: 120400 CFDA: Fiscal Month: JANUARY

HCM Dept.: Dist.Status: ALL Fund: A0001 Contract: Fiscal Year: 2019-2020

Journal: Dist.Type: ALL Class: Sponsor: Pay Run ID: Total Sub-Total Detail Sum Adjustments

Check: Dist.Class: ALL Account: Costshare: Output: Labor Only

Check Date (m/d/y): to Dist.Code:

Output - Labor Only

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR \$	LBR %
		1920-7 : PAY0092452	UG70	120400	HRL	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	361.06	20.61%
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	131.87	4.24%
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	5.74%
		1920-7 : PAY0092452	UG70	120400	T12	01/15/2020	PAY0092452	01/07/2020	A00000027167	CL067-120400-A0001-101-	320.29	91.43%
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	131.87	2.00%
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	2.72%
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	131.87	5.52%
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	7.44%
		1920-7 : PAY0092452	AH40	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000002484	CL067-120400-A0001-101-	2,414.21	100.00%
		1920-7 : PAY0093458	AH40	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000002484	CL067-120400-A0001-101-	2,414.21	100.00%
		1920-7 : PAY0092452	UG70	120400	HRL	01/15/2020	PAY0092452	01/08/2020	A00000006598	CL067-120400-A0001-101-	353.86	17.51%
		1920-7 : PAY0092452	UG70	120400	T12	01/15/2020	PAY0092452	01/07/2020	A00000027167	CL067-120400-A0001-101-	75.07	3.10%
		1920-7 : PAY0093458	UG70	120400	T12	01/15/2020	PAY0093458	01/23/2020	A00000027167	CL067-120400-A0001-101-	131.87	5.44%
		1920-7 : PAY0092452	UG70	120400	C12	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	140.66	2.40%
		1920-7 : PAY0093458	UG70	120400	C12	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	193.41	3.28%
		1920-7 : PAY0091883	AH40	120400	C12	12/15/2019	PAY0091883	12/23/2019	A00000002484	CL067-120400-A0001-101-	132.21	100.00%
		1920-7 : PAY0092452	UG70	120400	C09	01/15/2020	PAY0092452	01/07/2020	A00000006598	CL067-120400-A0001-101-	131.87	2.81%
		1920-7 : PAY0093458	UG70	120400	C09	01/31/2020	PAY0093458	01/23/2020	A00000006598	CL067-120400-A0001-101-	181.32	3.82%
TOTAL											99,776.44	



HCM Distribution – Key Take-Aways

- Make sure “All” is selected in Fiscal Year to ensure all results and any adjustments are returned.
- Pay attention to the pay groups to determine if they are paid current or on a lag.
- Pink lines represent retro funding changes.
- Use the sum adjustments checkbox to show the net amount on account.



Next Live Training Webinar:


HCM Distribution Webinar on
Wednesday, March 30th from 11:00
– 12:00.

- Meeting Invitations were emailed this morning!



Where to Find GFM Resources

GATEWAYS FOR: STUDENTS FACULTY & STAFF ALUMNI PARENTS CALENDAR MAP DIRECTORY GIVE

 **South Carolina**

SEARCH SC.EDU

Office of the Controller

- Office of the Controller
- General Accounting
- Grants and Funds Management**
- Grants and Funds Staff Directory
- Supplier and Tax Management
- Cash and Treasury Management
- Financial Reports and Transparency
- Chart of Accounts
- Policies and Procedures
- Contact Us

Grants and Funds Management

Grants and Funds Management is responsible for the accounting and management of all restricted grants and contracts within the university system.

Our Services

The Grants and Funds Management team:

- monitors all sponsored programs
- reviews expenses for compliance with grant terms and Uniform Guidance
- prepares and submits all invoices for sponsored programs , applies payments, and performs collections as necessary
- prepares all financial reporting, and provides financial status information for sponsors
- manages external sponsor audits and desk reviews
- responsible for set up of all sponsored programs in PeopleSoft
- responsible for close out of all sponsored program awards in PeopleSoft
- prepares and negotiates indirect cost rate agreement

Expand all (+)

- GFM Staff by Departmental Assignments (+)
- Sponsored Programs Close Out (+)
- F&A Allocations (+)
- Information Links for Grants and Contracts (+)

Webinars and Training

Expand all (+)

- Introduction to Grants Management (+)
- Grant Dashboard Reporting Tool (+)
- Post Award and Grant Closeout (+)
- Uniform Guidance and Effort Reporting (+)
- HCM Payroll Distribution Reporting Tool (+)
- New Time and Effort Reporting System (+)
- New Cost Transfer Policy and Retro Funding Change (+)

Contact Grants and Funds Management

For questions about any Grants and Funds Management services, please contact us directly:

Marle Baka
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Alex Pitts
Senior Manager – Accounts Receivable and Billing
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Contacts

If you have any questions regarding grants, please contact your Post Award Accountant (PAA).

For any other questions, please reach out to the Controller's Office using the email controller@sc.edu.



Questions





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