


USC



UNIVERSITY OF SOUTH CAROLINA

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The OneCarolina logo consists of the word "One" in black and "Carolina" in red, with a circular arrangement of red arrows pointing inward around the "One".

**University Dashboard  
Training**

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July 2016

# Welcome

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- Purpose of this class is to provide training on a new tool available in PeopleSoft called the University Dashboard.
- The University Dashboard is a financial management reporting tool that provides numbers and information to help manage funds from beginning budget to remaining balance for Sponsored Awards, Internal Projects, Operations and Construction Projects.
- It contains much of the same information as the Finance Intranet; the biggest difference is the data in the University Dashboard is real time. For example, as soon as a purchase requisition is budget checked, the amount will show as a pre-encumbrance within the Dashboard.
- This tool was developed in partnership with various university departments, finance departments and other external stakeholders.
- Everyone will have access to the tool in PeopleSoft.

# Agenda

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- Tool Differences
- Navigation
- Landing page
- Selection Criteria
- Search Results
- Drill Down Capabilities



# Tool Differences

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## University Dashboard

- Real time view of financial data (summary, detail & source)
- PeopleSoft look and feel
- Focus on operations – revenues & expenses
- More Grant information such as: Cost Share (direct & indirect), F&A, search by Award and search by PI

## Finance Intranet

- Point in time view of financial data (summary, detail & source)
- “Old” Intranet look and feel
- Focus includes assets and liabilities along with operations

# Navigation

Main Menu > USC Enhancements > University Dashboard

1. Enter a name for the inquiry in the **Inquiry Name** field.  
(Only 10 characters; does not accept special characters)
2. Click the **Add a New Value** tab.

### University Dashboard

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

▼ Search Criteria

Search by: Inquiry Name begins with

[Advanced Search](#)

# Dashboard Landing Page



**University Dashboard**

Inquiry Name 1234567890    Selection Criteria     Operating Unit

From DeptID     To DeptID     From Year     From Period   
Award ID     Project     To Year     To Period   
Activity     Fund Code   
Class Field      Budget Only

Selection Criteria

- Construction Projects(USCCP)
- Internal Projects (USCIP)
- Non Grants (USC01 & USCIP)
- Operations (USC01)
- Sponsored Projects (USCSP)

# Internal Projects (USCIP)



Required fields are:

- Operating Unit
- From/To Year and From/To Period

University Dashboard

Inquiry Name INTERNAL   \*Selection Criteria Internal Projects (USCIP)   Operating Unit CL040

From DeptID   To DeptID   From Year 2016   From Period 1  
Project   To Year 2016   To Period 7

Activity   Fund Code

Class Field    Budget Only

Search

# Operations (USC01)

Required fields are:

- Operating Unit
- From / To Year and From / To Period

University Dashboard

Inquiry Name OPERATIONS

\*Selection Criteria  Operating Unit

From DeptID  To DeptID

From Year  From Period

To Year  To Period

Fund Code

Class Field

Budget Only



# Budget Only

## Budget Only checkbox: (Internal Projects and Operations)

- When checked, only summary level results are returned.
- Designed to help departments monitor the category amounts submitted to the budget office to ensure they stay within budget amount by category.

University Dashboard

Inquiry Name **NONGRANTS** \*Selection Criteria **Non Grants (USC01 & USCIP)** Operating Unit **CL040**

From DeptID **155100** To DeptID **155100** From Year **2016** From Period **01**  
Project  To Year **2016** To Period **07**  
Activity  Fund Code   
Class Field

Budget Only

Search

# Budget Summary Info



- Drill down capabilities are not available when using the Budget Flag
  - Fields available in this view are: Category, Budget, Adj. Budget, Actuals (Expenses), Remaining Budget, Pre Encumbrance and Encumbrances

Summary by Category							Personalize	Find	View All			First	1-4 of 4	Last
Category	Budget	Adj.Budget	Actuals	Remaining Budget	Pre Encumbrance									
1 UNDERGRAD_ASSISTANTS	0.000	0.000	14,636.930	-14,636.930	0.000									
2 FRINGE_BENEFITS	0.000	0.000	429.260	-429.260	0.000									
3 CONTRACTUAL_SERVICES	0.000	0.000	209.300	-209.300	0.000									
4 SUPPLIES	0.000	0.000	9,115.430	-9,115.570	0.000									

# Search Results (Totals)



Formula used for each operating bucket except Sponsored Projects is:

Opening Balance +/-, Beginning Balance, +/- Budget Adjustments = Adjusted Budget + Revenue (i.e. tuition and fees) + Transfers In (transfers between operating units or departments) – Pre Encumbrance – Encumbrance – Expense = **Remaining Balance**

Totals	
Opening Balance:	54,134.860
Beginning Budget :	0.000
Budget Adjustments :	0.000
Adjusted Balance :	0.000
Revenue (4XXXX) :	69,038.570
Transfers In (81XXX) :	18,385.810
PreEncumbrance :	0.000
Encumbrance :	0.000
Expense :	39,781.100
Remaining Balance :	101,778.140

The diagram illustrates the calculation of the Remaining Balance. It shows a flow from the Adjusted Balance (0.000) to the Revenue (4XXXX) (69,038.570) and Transfers In (81XXX) (18,385.810) rows, which are added together. Then, the PreEncumbrance (0.000), Encumbrance (0.000), and Expense (39,781.100) rows are subtracted from the sum to arrive at the Remaining Balance (101,778.140). A large plus sign (+) is placed between the Adjusted Balance and the Revenue/Transfers In rows, and a large minus sign (-) is placed between the PreEncumbrance/Encumbrance/Expense rows and the Remaining Balance row. Red arrows indicate the direction of the calculation flow.

# Search Results (Summary)



- Adjusted Balance 1,488,883.000
- Expense – 719,471.500
- Remaining Budget = **769,411.500**

Summary							Personalize	Find	View All			First	1 of 1	Last
	. Beginning Balance	Revenue	Transfers In	PreEncumbrance	Encumbrance	Expense	Remaining Budget							
1	1,488,883.000	0.00	0.00	0.00	0.00	719,471.50	769,411.500							

# Exercise: Internal (USCIP)

- Inquire on internal projects for a department



- Operating Unit - CL040
- From / To Dept - 155900,155900
- From / To Year – 2016, 2016
- From / To Period - 1, 12
- Fund Code - E%



# Drill Down Capabilities

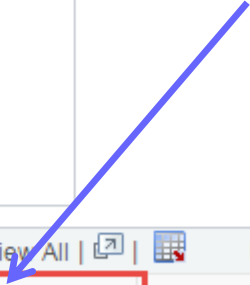


Totals									
Beginning Budget :				0.000					
Budget Adjustments :				4,000.000					
Adj.Beginning Balance :				4,000.000					
Revenue (4XXXX) :				0.000					
Transfers In (81XXX) :				0.000					
PreEncumbrance :				0.000					
Encumbrance :				0.000					
Expense :				722.650					
Remaining Balance :				3,277.350					

Summary									
Personalize   Find   View All   [Print]   [Grid]									
First ◀ 1 of 1 ▶ Last									
	Fund Code	Class Field	USC Department/Fund	Beginning Budget	Budget Adjustments	Adj. Beginning Balance	Revenue	Transfers In	
1	A1000	202	15510A407	0.000	4,000.00	4,000.000	0.00	0.00	

Summary information with drill down capabilities are displayed below in the grid.



# Budget Adjustment Detail



Personalize   Find   View All							
First  1 of 1  Last							
Category	Account	Amount	Source	Document ID	Line Descr	Journal Date	
1 CURRENT ENT FISCAL YEAR UNDIST	50001	4,000.000	Budget Journal	0000010365	10364 - Study Abroad faculty c	03/09/2016	
Total Amount:		4,000.000					

- Category
- Account
- Source
- Document ID
- Line Descr (description)
- Journal Date

**Depending on your security access**, you can drill down even further by clicking the icon in the Document ID field.



# Go to Source Options

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- After clicking the icon for the Document ID, the following links are displayed:
  - If you have security access to enter Budget Information, click the Source Entry link to launch the Budget Entry page.
  - Most users will only have access to view Budget Information, clicking the Source Inquiry link will launch the Budget Inquiry page.

Please select one of the following links:

[Go to Source Entry](#)

[Go to Source Inquiry](#)

# Security Access Error



You are not authorized for this page. [https://fms-prd.ps.sc.edu/psc/FPRD\\_2/EMPLOYEE/ERP/c/MANAGE\\_COMMITMENT\\_CONTROL.KK\\_BD\\_XFER2.GBL?Page=KK\\_BD\\_ENTRY1&Action=U&ForceSearch=Y&BUSINESS\\_UNIT=USC01&JOURNAL\\_DATE=2016-03-09&JOURNAL\\_ID=0000010365&UNPOST\\_SEQ=0&TargetFrameName=None](https://fms-prd.ps.sc.edu/psc/FPRD_2/EMPLOYEE/ERP/c/MANAGE_COMMITMENT_CONTROL.KK_BD_XFER2.GBL?Page=KK_BD_ENTRY1&Action=U&ForceSearch=Y&BUSINESS_UNIT=USC01&JOURNAL_DATE=2016-03-09&JOURNAL_ID=0000010365&UNPOST_SEQ=0&TargetFrameName=None)

- This error is displayed if the security access to a particular page is missing.
- Email [pssecure@mailbox.sc.edu](mailto:pssecure@mailbox.sc.edu) to request access to this page.
  - Access granted may be View Only (Inquiry).

# Drill Down into Revenue



Summary								Personalize	Find	View All	First	1-2 of 2	Last
	USC Department/Fund	Beginning Budget	Budget Adjustments	Adjusted Balance	Revenue	Transfers In	PreEncumbrance						
1		0.000	0.00	0.000	32,857.75	3,000.00	0.						
22	15590E150	0.000	0.00	0.000	36,180.82	0.00	0.						

							Personalize	Find
	Category	Account	Amount	Source	Document ID			
1	RECOVERY OF INDIRECT COST	43000	2,260.220	Grants	GM00005759			
2	RECOVERY OF INDIRECT COST	43000	57.850	Grants	GM00005758			
3	RECOVERY OF INDIRECT COST	43000	17,924.100	Online Journal Entry	0000018088			
4	RECOVERY OF INDIRECT COST	43000	1,168.220	Online Journal Entry	0000013871			
5	RECOVERY OF INDIRECT COST	43000	6,070.880	Online Journal Entry	0000013404			
6	RECOVERY OF INDIRECT COST	43000	4,712.710	Online Journal Entry	0000011736			
7	RECOVERY OF INDIRECT COST	43000	3,986.840	Online Journal Entry	0000010094			
<b>Total Amount:</b>			<b>36,180.820</b>					


# Drill Down into Revenue

**Journals**

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

▼ **Search Criteria**

Inquiry Name

[Basic Search](#)  [Save Search Criteria](#)

**Create a run control ID if you have never done so for this page.**



**Journal Inquiry**

**Journal Criteria**

Inquiry AG	*Unit <input type="text" value="JSC01"/>	*Ledger <input type="text" value="ACTUALS"/>	*Year <input type="text" value="2016"/>	*From Period <input type="text" value="1"/>	*To Period <input type="text" value="11"/>	Suspense Status <input type="text"/>
<b>Journal ID</b> <input type="text" value="GM00005759"/>	Status <input type="text"/>	<b>Source</b> <input type="text" value="GM"/>	Currency <input type="text"/>	Stat <input type="text"/>	Document Type <input type="text"/>	<input type="checkbox"/> Date Code Adj
User <input type="text"/>	Document Sequence <input type="text"/>	Sort By <input type="text" value="Journal Id"/>	Max Rows <input type="text" value="100"/>	Attachment Exist <input type="text"/>		

# Drill Down into Revenue



**Journal Inquiry**

**Journal Criteria**

Inquiry: AG    \*Unit: USC01    \*Ledger: ACTUALS    \*Year: 2016    \*From Period: 1    \*To Period: 11    Suspense Status: [ ]

**Journal ID**: GM00005759    Status: [ ]    **Source**: GM    Currency: [ ]    Stat: [ ]    Document Type: [ ]     Date Code Adj

User: [ ]    Document Sequence: [ ]    Sort By: Journal Id    Max Rows: 100    Attachment Exist: [ ]

**Journals**    Personalize | Find | [ ] | [ ]    First 1 of 1 Last

Journal ID	Date	Unit IU	Status	Source	Suspense Status	User	Unpost Date	Descr
GM00005759	11/30/2015	USC01	Posted	GM	No Susp	HAMBRICG	11/30/2015	F&A Calculation

- Enter the Journal ID and Source and click the Search button.
- Information regarding the journal is displayed.
- Click the link of the Journal ID to get more detail.

# Drill Down into Revenue



**Journal Header**

Journal ID	GM00005759	Date	11/30/2015	Schedule	
Ledger Group	ACTUALS	Original Date	11/30/2015	Process	No Request
Source	GM	Date Posted	12/10/2015	Total Lines	10060
Journal Status	Posted	Reversal Date		User ID	HAMBRICG
Balanced	DR=CR	Reversal	None	InterUnit BU	USC01
Doc Seq		Budget Status	Valid	Date Code Adjustment	N
Long Description	F&A Calculation				

View Attachment (0)

All Lines       From/To Lines  
 From Line       To Line

**This journal contains 100 lines.**

Totals by Currency

Currency	USD	Debit Amount	7,429,039.59	Credit Amount	7,429,039.59	Net	0.00
----------	-----	--------------	--------------	---------------	--------------	-----	------

Find | View All    First 1 of 1 Last




**Journal Line**      Personalize | Find | View All |  |

First 1-25 of 100 Last

Drill to Source	Line #	Line Descr	SpeedType	Amount (in Transaction Currency)	Currency	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit
	1	F&A Calculation		32.44	USD	CL004	000000	E2588	10300	000	USCSP
	2	F&A Calculation		54.02	USD	CL004	000000	E2591	10300	000	USCSP
	3	F&A Calculation		129.66	USD	MC000	000000	EN700	10300	000	USCSP
	4	F&A Calculation		-216.12	USD	MC000	000000	F1000	10300	000	USCSP

# Drill Down into Pre Encumbrance

- Requisition ID
- Requisition Name
- Requester
- Supplier Name
- Amount
- Requisition Status
- Requisition Date

<a href="#">Personalize</a>   <a href="#">Find</a>   <a href="#">View All</a>      							
	Requisition ID	Requisition Name	Requester	Supplier Name	PreEncumbrance	Requisition Status	Requisition Date
1	1000006276 	X Wang Kinova	BURTA	KINOVA INC-001	26,135.000	Approved	09/02/2015
2	1000002988 	Xiaofeng Wang IntelinAir	BURTA	INTELINAIR-001	15,000.000	Approved	07/28/2015
Total Amount:					41,135.000		

# Drill Down into Pre Encumbrance

Please select one of the following links:  
[Go to Source Entry](#)  
[Go to Source Inquiry](#)



Requisitions							
Req Inquiry		Personalize   Find   View All      				First  1 of 1  Last	
Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
USC01	<b>1000002988</b>	Xiaofeng Wang IntelinAir	Approved	Ashley Burt	07/28/2015	15,000.00	USD



# Requisition Details



- Actual Requisition is available to view.
- Comments and attachments are available, if applicable.

Requisition Details										
Business Unit		USC01		Req ID		1000002988				
Requester		Ashley Burt								
Requisition Date		07/28/2015		Merchandise Amount		15,000.00 USD				
Req Status		Approved		Pre-Encumbrance Balance		15000.00USD				
Requisition Details										
Personalize   Find   View All						First  1 of 1  Last				
Details   More   Contract										
Line	Status	Item ID	Description	Supplier ID	Supplier	Req Qty	UOM	Merchandise Amt	Amount Only	
1	Approved		Small Hexarotor for Flight Con	0000005411	INTELINAIR INC	1.0000	Each	15,000.00 USD	<input type="checkbox"/>	

# Requisition Comments



- Line comments available to view.

**Line Comments**

Business Unit USC01      Req ID 1000002988      Line 1

Retrieve Active Comments Only     

\*Sort Method       \*Sort Sequence      

**Comments**      Find | View All      First ◀ 1 of 1 ▶ Last

Comment Status Active

<<Small Hexarotor for Flight Control Research, with one year maintenance and support; one year MATLAB Simulink Toolbox and support>>

Send to Supplier       Shown at Receipt  
 Shown at Voucher       Approval Justification

**Associated Document**

Attachment                   Email

From -> REQ USC01-1000002988-1

# Schedule Details

## Requisition Details

Business Unit USC01                      Req ID 1000002988  
 Requester Ashley Burt  
 Requisition Date 07/28/2015                      Merchandise Amount 15,000.00 USD  
 Req Status Approved                      Pre-Encumbrance Balance 15000.00USD

### Requisition Details

Personalize | Find | View All | |    First 1 of 1 Last

Details | More | Contract

Line	Status	Item ID	Description	Supplier ID	Supplier	Req Qty	UOM	Merchandise Amt	Amount Only		
1	Approved		Small Hexarotor for Flight Con	0000005411	INTELINAIR INC	1.0000	Each	15,000.00 USD	<input type="checkbox"/>		



## Schedule Details

Business Unit USC01    Req ID 1000002988    Line 1

### Schedule

Personalize | Find | View All | |    First 1 of 1 Last

Sched	Status	Due Date	Ship To	Ship Via Code	Freight Terms	One Time Addr	Price	Req Qty	Merchandise Amt	Revision
1	Active	08/04/2015	173-3A80A	COMMON	DESTFP	Y	15,000.00000	1.0000	15,000.00 USD	

Ship To Comments

# Distribution Lines



Distribution Information

Business Unit USC01    Req ID 1000002988    Line 1    Sched Num 1

Distribution Personalize | Find | View All | |    First 1 of 1 Last

**Details** | More | Asset Information | Budget Information

Distrib	Status	Location	Req Qty	Merchandise Amt	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity
1	Processed	POBU	1.0000	15,000.00 USD	USC01	CL040	155318	A1000	56203	202	USCIP	40STRUP	10001113

Distribution Information

Business Unit USC01    Req ID 1000002988    Line 1    Sched Num 1

Distribution Personalize | Find | View All | |    First 1 of 1 Last

Details | More | Asset Information | **Budget Information**

Distrib	Status	Location	Req Qty	Budget Status	Budget Date	Merchandise Amount	Pre-Encumbrance Balance	Currency	Pre-Encumbered Base Balance	Base Currency	Commitment Control Close Flag
1	Processed	POBU	1.0000	Valid	07/28/2015	15,000.00	15000.00	USD	15000.00	USD	<input type="checkbox"/>

# Drill Down into Encumbrance



- PO Number
- Requisition ID
- Supplier Name
- PO Amount
- PO Status
- PO Date
- Expense To Date
- Remaining Encumbrance

## Encumbrance Details


Personalize   Find   View All   [Print]   [Calendar]						
	PO Number	Requisition ID	Supplier Name	PO Amount	PO Status	PO Date
1	2000024439	1000023588	FISHERSCIE-001	33,849.360	Dispatched	05/03/2016

**Total Remaining Encumbrance:** 8,902.290

# Drill Down into Encumbrance

Personalize   Find   View All   [Print] [Calendar] First 1 of 1 Last					
PO Amount	PO Status	PO Date	Expense To Date	Remaining Encumbrance	
1 33,849.360	Dispatched	05/03/2016	-24,947.070	8,902.290	
Total Remaining Encumbrance:				8,902.290	

**PO Number**

2000024439 



Please select one of the following links:

[Go to Source Entry](#)

[Go to Source Inquiry](#)

# PO Detail



- All PO detail information is available including comments, if applicable

Purchase Order Inquiry

**Purchase Order**

Business Unit USC01 PO ID 2000024439 PO Status Dispatched Budget Status Valid

▼ **Header**

PO Date 05/03/2016 Doc Tol Status Valid

Supplier Name FISHERSCIE-001 Backorder Status Not Backordered

Supplier ID C000000265 Supplier Details Receipt Status Not Recvd

Buyer Kevin Sanders  Hold From Further Processing

PO Reference Online Src From Req 1000023588

Header Details Activity Summary

All RTV Header Comments...

Matching Document Status

▼ Actions

**Amount Summary**

Merchandise	31,342.00
Freight/Tax/Misc.	2,507.36
<b>Total</b>	<b>33,849.36 USD</b>
Encumbrance Balance	8,902.29 USD

**Lines** Personalize | Find | View All | First 1 of 1 Last

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		lab supplies for Dr. Seongtae	490	1.0000	LOT	31,342.00 USD	Approved

# Comments and Attachments



- All PO detail information is available including comments, if applicable

**PO Line Comments**

Business Unit USC01      PO ID 200024439      Supplier FISHERSCIE-001

Retrieve Active Comments Only     

\*Sort Method       \*Sort Sequence      

**Comments**      Find | View All      First 1 of 1 Last

Comment Status Active

<<Supplies for Seongtae Bae's Lab: analytical balance, basic gravity oven, vortex promo w/ sing tub holder, ultrasonic bath, mini digital rotator, universal platform for clamps, rubber mat, dimpled mat w/ tray, stirring hotplate, centrifuge tubes (various sizes), microcentrifuge tubes, graduated cylinders, retriever stir bars, stir bar kit, dissecting forceps, scoopula, spoonula, syringes (various sizes), nitrile gloves (various sizes), pipettors and pipettes (various sizes), pipette stand, beakers (various sizes), cast iron ring with clamp (various sizes), tube holder, centrifuge racks (various sizes), lab jack, cork rings (various sizes), thermometer and thermometer holder

Send to Supplier       Shown at Receipt  
 Shown at Voucher

**Associated Document**

Attachment Bae_Fisher_Scientific.pdf	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input checked="" type="checkbox"/> Email
--------------------------------------	---------------------------------------	-------------------------------------	-------------------------------------------

From -> REQ USC01-1000023588-1



# Schedules - Details

- Due Date
- Ship To
- Attention To
- PO Quantity
- Price
- Merchandise Amount
- Status
- Icons: Price Adjustment, Miscellaneous Charges, Sched Sales/Use Tax and Distributions/ChartFields

Lines										Personalize   Find   View All   [Print]   [Calendar]		First	1 of 1	Last
Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount		Status						
1		Registration for Wien 2K on th	936	1.0000	EA	434.52 USD		Approved						

Lines										Find   View All		First	1 of 1	Last
Line 1	Registration for Wien 2K on th		PO Qty 1.0000	EA	Merchandise Amt	434.52 USD								
Schedules										Personalize   Find   View All   [Print]   [Calendar]		First	1 of 1	Last
Details		Statuses												
Sched	Due Date	Time Due	Revision	Ship To	Attention To		PO Qty	Price	Merchandise Amount	Status				
1	11/05/2015			236	Lalitha Ravi		1.0000	434.52000	434.52 USD	Active				

# Distribution Lines

- All PO detail information is available including comments, if applicable

## Distributions for Schedule 1

PO ID 2000024439    Line 1    Sched 1    Item    lab supplies for Dr. Seongtae Bae 

Status Active    Sched Qty 1.0000

Distribute By Amount    Merchandise Amount 31,342.00 USD

Doc. Base Amount 31,342.00 USD

## Distributions

Personalize |


**Chartfields**   Details/Tax   Asset Information   Req Detail   Budget Information   

Dist	Status	Percent	Merchandise Amt	GL Unit	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Cost Share
1	Open	100.0000	31,342.00 USD	USC01	CL040	155318	A1000	53002	202	USCIP	40STRTUP	100011697	

# Budget Information

- (PO) Status
- Percent
- Budget Status
- Budget Date
- Encumbrance Balance
- Expensed to Date





Distributions for Schedule 1

PO ID 2000024439    Line 1    Sched 1    Item    lab supplies for Dr. Seongtae Bae 

Status Active    Sched Qty 1.0000

Distribute By Amount    Merchandise Amount 31,342.00 USD




Doc. Base Amount 31,342.00 USD

**Distributions**    Personalize | Find | View All |  |     First  1 of 1  Last

Chartfields	Details/Tax	Asset Information	Req Detail	Budget Information								
Dist	Status	Percent	Budget Status	Budget Date	Encumbrance Balance	Encumbrance Balance	Currency	Encumbered Base Balance	Base Currency	Expensed To Date	Final	Commitment Control Close Flag
1	Open	100.0000	Valid	05/03/2016	8,902.290	8902.29	USD	8,902.29	USD	23,099.13	<input type="checkbox"/>	<input type="checkbox"/>

# Expense Detail

- Category
- Account
- Amount
- Source
- Document ID

Personalize   Find   View All       First 1 of 1 Last							
	Category	Account	Amount	Source	Document ID	Line Descr	Journal Date
1	USC EMPLOYEE TRAVEL FOREIGN	52025	722.650	AP Voucher	01133454 		04/20/2016
Total Amount:			722.650				



Please select one of the following links:

[Go to Source Entry](#)

[Go to Source Inquiry](#)

# Voucher Inquiry - Details





- Voucher ID
- Invoice Number
- Invoice Date
- Supplier ID
- Entry Status
- Match Status
- Short Supplier Name


Voucher Inquiry

▶ Search Criteria

▶ Sort Criteria

▶ Display Currency Criteria





Voucher Inquiry Results Personalize | Find | View All |  |  | First  1 of 1  Last

Voucher Details | Amounts | More Details | Supplier Details 

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	USC01	01133454	13232	04/19/2016	SP00000004	Postable	<input type="checkbox"/>	Not Applicable	TRAVEL-001



# Voucher Inquiry - Amounts


- Transaction Currency
- Gross Invoice Amount
- Voucher Unpaid Balance
- Unpaid Prepayments
- Total Non-Merch
- Entered VAT
- Gross Amount Paid
- Net Amount Paid

Voucher Inquiry Results										
Personalize   Find   View All       First  1 of 1  Last										
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	01133454	USD	722.65	0.00	0.00	0.00	0.00	722.65	722.65

# Voucher Inquiry - More Details

- Voucher Style
- Supplier Loc (location)
- Post Status
- Approval Status
- Close Status
- Origin
- Due Date
- Basis Date
- Acctg Date
- Entered On
- Budget Header Status
- Budget Misc Status






**Voucher Inquiry Results** Personalize | Find | View All |  |  First 1 of 1 Last

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

Actions	Business Unit	Voucher ID	Voucher Style	Supplier Loc	Post Status	Approval Status	Close Status	Origin	Due Date	Basis Date	Acctg Date	Entered on	Budget Header Status	Budget Misc Status
▼ Actions	USC01	01133454	Single Payment Voucher	1	Posted	Approved	Open	TRV	04/19/2016	04/19/2016	04/20/2016	04/20/2016	Valid	Valid Budget Check

# Voucher Inquiry - Supplier Details

- Supplier ID
- Short Supplier Name
- Supplier Name

Voucher Inquiry Results							Personalize   Find   View All      	First  1 of 1  Last
Voucher Details		Amounts	More Details	Supplier Details 				
Actions	Business Unit	Voucher ID	Supplier ID	Short Supplier Name	Supplier Name	Additional Name	History Status	
▼ Actions	USC01	01133454	SP00000004	TRAVEL-001	SINGLE PAY TRAVEL AND EXPENSES		<input checked="" type="checkbox"/>	



# Exercise: Drill Down

---



- Operating Unit - CL040
- From / To Period - 1, 12
- From / To Dept - 155900
- Fund Code - E%
- From . To Year – 2016, 2016

# Sponsored Projects (USCSP)

Required fields are:

- Acctg Date From – 01/01/1901 (recommended)
- Acctg Date To – current date
- From DeptID and To DeptID

University Dashboard

Inquiry Name SPONSORED    Selection Criteria

From DeptID     To DeptID     Acctg Date From     Acctg Date To

Award ID     Project

PI Name     Project Status

# Award Information



- 80 awards for department 155100

Award ID		Description			
CON0002982	EAGER: Modulation of the Inflammatory Response for Accelerated Tissue Vascularization and Bone Regen				
Begin Date		End Date		PI Name	
06/01/2016		05/31/2017		JABBARZADEH,EHSAN	
Summary For Award					
	Budget	Actual	PreEncumbrance	Encumbrance	Remaining
Direct	81,433.000	0.000	0.000	0.000	81,433.000
InDirect	28,567.000	0.000			28,567.000
<b>Total Amt.</b>	<b>110,000.000</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>	<b>110,000.000</b>
Cost Share Direct	0.000	0.000			0.000
Cost Share InDirect	0.000	0.000			0.000
Recognized Revenue:		0.000		Uncollected Revenue: 0.000	

# Summary for Award



Formula: Budget – Actual (Expenses) – PreEncumbrance – Encumbrance = **Remaining Budget**

Award Information						Find   View All	First	1 of 80	Last
Award ID	CON0002982	Description	EAGER: Modulation of the Inflammatory Response for Accelerated Tissue Vascularization and Bone Regen						
Begin Date	06/01/2016	End Date	05/31/2017	PI Name	JABBARZADEH,EHSAN				
Summary For Award									
	Budget	Actual	PreEncumbrance	Encumbrance	Remaining				
Direct	81,433.000	0.000	0.000	0.000	81,433.000				
InDirect	28,567.000	0.000			28,567.000				
<b>Total Amt.</b>	<b>110,000.000</b>	<b>0.000</b>	<b>0.000</b>	<b>0.000</b>	<b>110,000.000</b>				
Cost Share Direct	0.000	0.000			0.000				
Cost Share InDirect	0.000	0.000			0.000				
Recognized Revenue:	0.000		Uncollected Revenue:	0.000					

# Project Information



- Project
- Description
- PI Name
- USC Dept/Fund
- Begin Date
- End Date
- PreEncumbrance
- Encumbrance
- Direct Cost Budget
- Direct Cost Actuals
- Direct Cost Remaining
- Indirect Cost Budget

Project Information Personalize | Find | View All | [Print] | [Calendar] First 1 of 1 Last

Details To Date Amounts [Filter]

Project	Description	PI Name	USC Dept/Fund	Begin Date	End Date
1 10006787	EAGER: Modulation of the Inflammatory Response for	EHSAN JABBARZADEH	15510FC81	06/01/2016	05/31/2017

Project Information Personalize | Find | View All | [Print] | [Calendar] First 1 of 1 Last

Details To Date Amounts [Filter]

PreEncumbrance	Encumbrance	Direct Cost Budget	DirectCost Actuals	Direct Cost Remaining	Indirect Cost Budg
1 0.00	0.00	81,433.000	0.00	81,433.000	28,567

# Award with Two Projects



## Award Information

Find | View All First 6 of 80 Last

**Award ID** CON0002834

**Description** Explore Innovative Chemistry of Natural Gas Conversion to DME (Dimethyl Ether)

**Begin Date** 03/02/2016

**End Date** 09/30/2018

**PI Name** HEYDEN,ANDREAS

### Summary For Award

	Budget	Actual	PreEncumbrance	Encumbrance	Remaining
Direct	80,000.000	19,468.920	0.000	0.000	60,531.080
InDirect	0.000	0.000			0.000
<b>Total Amt.</b>	<b>80,000.000</b>	<b>19,468.920</b>	<b>0.000</b>	<b>0.000</b>	<b>60,531.080</b>
Cost Share Direct	0.000	0.000			0.000
Cost Share InDirect	0.000	0.000			0.000

**Recognized Revenue:** 19,468.920

**Uncollected Revenue:** -9,068.540

## Project Information

Personalize | Find | View All | [Print] | [Calendar]

First 1-2 of 2 Last

Details To Date Amounts [Filter]

Project	Description	PI Name	USC Dept/Fund	Begin Date	End Date	Pre
1 600	Explore Innovative Chemistry of Natural Gas Conversion to DME (Dimethyl Ether)	FANGLIN CHEN	15540FD13	03/02/2016	09/30/2016	
2 579	Explore Innovative Chemistry of Natural Gas Conver	ANDREAS HEYDEN	15510FC76	03/02/2016	09/30/2016	

# Drill Down Capabilities



Award Information Find | View All First 8 of 80 Last

**Award ID** CON0002747 **Description** Boeing/University Master Agreement for Basic and Applied Research

**Begin Date** 11/16/2015 **End Date** 06/30/2018 **PI Name** KIRKLAND,WILLIAM

### Summary For Award

	Budget	Actual	PreEncumbrance	Encumbrance	Remaining
Direct	51,640.000	16,845.950	0.000	4,860.000	29,934.050
InDirect	6,780.000	6,393.740			386.260
<b>Total Amt.</b>	<b>58,420.000</b>	<b>23,239.690</b>	<b>0.000</b>	<b>4,860.000</b>	<b>30,320.310</b>
Cost Share Direct	0.000	0.000			0.000
Cost Share InDirect	0.000	0.000			0.000

Recognized Revenue: 0.000 Uncollected Revenue: 0.000

### Project Information

Personalize | Find | View All | First 1 of 1 Last

Details To Date Amounts

	Encumbrance	Direct Cost Budget	DirectCost Actuals	Direct Cost Remaining	Indirect Cost Budget	InDirectCost Actuals
1	4,860.00	51,640.000	16,845.95	29,934.050	6,780.000	6,393.74





# Direct Cost Actuals



Project Information						
Details		To Date Amounts				
	Direct Cost Budget	DirectCost Actuals	Direct Cost Remaining	Indirect Cost Budget	InDirectCost Actuals	Indirect Cost Remaining
1	51,640.000	16,845.95	29,934.050	6,780.000	6,393.74	386.260



Category	Account	Amount	Source	Document ID	Line Descr	Journal Date
1 GRADUATE ASSISTANT TUITION SUP	54525	3,096.000	Banner Journals	BNR0007652		01/27/2016
2 EDUCATIONAL SUPPLIES	53002	12.120	RQ Journals	RQ00013995		05/12/2016
3 EDUCATIONAL SUPPLIES	53002	235.620	RQ Journals	RQ00013994		05/12/2016
4 EDUCATIONAL SUPPLIES	53002	31.760	RQ Journals	RQ00012292		04/13/2016
5 EDUCATIONAL SUPPLIES	53002	1,123.830	RQ Journals	RQ00012290		04/13/2016
6 EDUCATIONAL SUPPLIES	53002	42.080	RQ Journals	RQ00010549		03/11/2016
7 EDUCATIONAL SUPPLIES	53002	655.620	RQ Journals	RQ00010548		03/11/2016
8 USC EMPLOYEE TRAVEL FOREIGN	52025	410.060	AP Voucher	01145518		05/13/2016
9 FREIGHT,EXPRESS AND DELIVERIES	52010	23.560	RQ Journals	RQ00012290		04/13/2016
10 FRINGE BENEFITS	51900	321.460	Payroll Processing	PAY0015131		05/30/2016
<b>Total Amount:</b>		<b>16,845.950</b>				

# Direct Cost Drill Down

Please select one of the following links:

[Go to Source Entry](#)

[Go to Source Inquiry](#)



## Journal Inquiry

### Journal Criteria

Inquiry AG	*Unit USC01	*Ledger ACTUALS	*Year 2016	*From Period 1	*To Period 11	Suspense Status	
Journal ID PAY0015131	Status	Source PAY	Currency	Stat	Document Type	<input type="checkbox"/> Date Code Adj	
User	Document Sequence	Sort By Journal Id	Max Rows 100	Attachment Exist			

Search

Delete

Clear

### Journals

#### Journals

Personalize | Find |  |  | First  1 of 1  Last

Journal ID	Date	Unit IU	Status	Source	Suspense Status	User	Unpost Date	View Attachment	Descr
PAY0015131	05/30/2016	USC01	Posted	PAY	No Susp	CMCINNIS	05/30/2016		05/31/16 Fringe Expe

# Direct Cost Drill Down



## Journal Inquiry Details

### ▶ Ledger Criteria

Go To Journal Criteria

### Journal Header

Journal ID	PAY0015131	Date	05/30/2016	Schedule	
Ledger Group	ACTUALS	Original Date	05/30/2016	Process	No Request
Source	PAY	Date Posted	05/30/2016	Total Lines	3889
Journal Status	Posted	Reversal Date		User ID	CMCINNIS
Balanced	DR=CR	Reversal	None	InterUnit BU	USC01
Doc Seq		Budget Status	Valid	Date Code Adjustment	N
Long Description	05/31/16 Fringe Expenses				

View Attachment (1)

All Lines
  From/To  
 From Line  To Line

Query Journal Lines

This journal contains 100 lines.

### Totals by Currency

Find | View All First 1 of 1 Last

Currency	USD	Debit Amount	14,879,892.55	Credit Amount	14,879,892.55	Net	0.00
----------	-----	--------------	---------------	---------------	---------------	-----	------

### Journal Line

Personalize | Find | View All | First 1-25 of 100 Last

Line #	Line Descr	SpeedType	Amount (in Transaction Currency)	Currency	Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project
1	JE050997-ALL FRINGE BENEFITS		2,386.10	USD	CL086	100700	A0001	51900	503		
2	JE050997-ALL FRINGE BENEFITS		1,554.45	USD	CL064	100800	A0001	51900	458		
3	JE050997-ALL FRINGE BENEFITS		0.49	USD	CL064	100902	A0001	51900	458		

# Indirect Cost Actuals



**Project Information** Personalize | Find | View All | [Print] | [Calendar] First 1 of 1 Last

**Details** | To Date Amounts [Filter]

	Direct Cost Budget	DirectCost Actuals	Direct Cost Remaining	Indirect Cost Budget	InDirectCost Actuals	Indirect Cost Remaining
1	51,640.000	16,845.95	29,934.050	6,780.000	6,393.74	386.260

**InDirectCost Actuals Details**

Category	Account	Amount	Source	Document ID	Line Descr	Journal Date
1 INDIRECT COST RECOVERY	59990	6,393.740				
<b>Total Amount:</b>		<b>6,393.740</b>				

# Exercise: Sponsored (USCSP)

---

- Inquire on a sponsored project



- Award ID CON0000937
- Acctg Date From / To – 01/01/2000, 7/31/2016
- Project Status - All

# Construction (USCCP)



Required fields are:

- Operating Unit
- Acctg Date From – 01/01/1901 (recommended)
- Acct Date To – current date

University Dashboard

Inquiry Name CONSTRUCT \*Selection Criteria Construction Projects(USCCP) Operating Unit CL088

From DeptID To DeptID Acctg Date From 01/01/1901 Acctg Date To 05/03/2016

Project Activity Project Manager

Search

# Appendix – Construction Projects



Required fields are:

- Operating Unit
- Acctg Date From / To (Recommended 01/01/1901)
- Project

University Dashboard

Inquiry Name CONSTRUCT    Selection Criteria Construction Projects(USCCP)    Operating Unit CL088

From DeptID     To DeptID     Acctg Date From 01/01/1901    Acctg Date To 04/27/2016

Project 50002035

Activity

Project Manager

Search

# Project Information

Information brought over:

- USC Dept/Fund, Project Number and State #

Project Information
Find | View All
First ◀ 1 of 1 ▶ Last

<b>Project</b> 50002035	<b>Description</b> COLUMBIA:CP00280217:53100-W768		<b>Project Manager</b>
<b>Begin Date</b> 10/13/2009	<b>End Date</b> 06/30/2050	<b>Project Status</b> 00PLANNING	<b>USC Dept/Fund</b> 53100W768  <b>Project #</b> CP00280217  <b>State#</b> S-H27-6069






<b>Beginning Budget:</b>	106,500,000.000
<b>Budget Adjustments:</b>	0.000
<b>PreEncumbrance:</b>	379,436.000
<b>Encumbrance:</b>	2,129,023.450
<b>Expense:</b>	105,223,425.070
<b>Remaining Budget:</b>	-1,231,884.520



# Activity Details

## Project Activities:

- Activity line one contains the budget.
- Money is moved to other activities in the form of budget adjustments.

Activity Information							Personalize   Find   View All      	First  1-10 of 15  Last
Activity Details		Amounts						
	Beginning Budget	Budget Adjustments	PreEncumbrance	Encumbrance	Expense	Rema		
1	106,500,000.000	-106,138,537.680	0.00	507,917.47	104,841,498.48			
2	0.000	13,876,231.000	299,436.00	43,551.54	22,870.61			
3	0.000	253,437.680	0.00	0.00	0.00			
4	0.000	1,564,667.000	0.00	0.00	0.00			
5	0.000	84,619,002.000	80,000.00	1,532,260.86	329,123.78			
6	0.000	4,514,700.000	0.00	0.00	28,338.95			
7	0.000	133,000.000	0.00	0.00	0.00			
8	0.000	79,640.000	0.00	0.00	0.00			
9	0.000	316,000.000	0.00	0.00	0.00			
10	0.000	5,000.000	0.00	0.00	1,593.25			

# Appendix: Grants Dashboard Report



The Grants Dashboard Report is also new in PeopleSoft. This tool creates a printable version of the grant information you are accustomed to seeing in the “old” Intranet.

The screenshot shows the PeopleSoft navigation menu on the left and the Resources section on the right. The 'Resources' menu item is highlighted with a red arrow. In the Resources section, the 'Recent' list contains a link for 'Steps to run Grant Dashboard Report' which is highlighted with a red box. The 'Most Popular' list contains various other resource links.

**PeopleSoft**

- About
- News
- Training
- Resources**
- FAQs
- Newsletters
- Contact Us
- New User Information

**Resources**

News

Events

### Resources

Click a link below to download the selected resource

Recent	Most Popular
<ul style="list-style-type: none"><li>Time and Effort Reporting PPT ★</li><li>University Dashboard Quick Reference ★</li><li><b>Steps to run Grant Dashboard Report ★</b></li><li>Creating a Change Request in PeopleSoft PPT ★</li><li>Hot Topic PPT 7 (6-23-16) ★</li><li>Query Viewer PPT ★</li><li>Hot Topic PPT 6 (6-9-16)</li><li>Approver - Out of Office ★</li></ul>	<ul style="list-style-type: none"><li>USCSP Analysis Types Guide ★</li><li>Requisition and Receiving PPT »</li><li>Payment Request Matrix »</li><li>Query Listing with Descriptions »</li><li>PeopleSoft Chart of Accounts »</li><li>New Code Structure</li><li>Payment Request Changes PPT</li><li>Procure to Pay Policy Changes PPT</li><li>Revised PeopleSoft Categories</li></ul>

# Appendix: Grants Dashboard Report



## Navigation:

Main Menu > USC Enhancements > Grants Dashboard Report

The screenshot shows the "Grant Dashboard Report" interface. At the top, there is a header bar with "Grant Dashboard Report" on the left and "Run Control ID ag", "Report Manager", "Process Monitor", and a "Run" button on the right. A blue circle with the number "3" is next to the "Run" button. Below the header, there is a sub-header "Grant Dashboard Report" with a blue circle and the number "1" next to it. Underneath, there are two date input fields: "Accounting Date From" with the value "01/01/1901" and "Accounting Date To" with the value "07/31/2016". Below these fields, a red arrow points to the text "Please select one of the below options to run the report". Underneath this text, there is a search area with a red box around it and a blue circle with the number "2" next to it. This area contains four search criteria: "Award ID" with the value "CON0000937", "Project Status" with a dropdown menu set to "All", "Project", "Department", and "PI Name", each with a search icon.

# Appendix: Grants Dashboard Report



## GL Dashboard Report

Run By: Award  
 From Accounting Date: 01/01/1901  
 To Accounting Date: 07/31/2016

Run Date: 07/28/2016

### Award Information

Award ID:	CON0000937	Award Description:	Fundamental Studies of Bimetallic Fuel Cell Cataly	Award PI Name	JOHN MONNIER
Award Start Date	08/01/2013	Award End Date:	09/30/2016	Sponsor	Toyota Motor Engineering & Manufacturing

### Department Information

Department ID:	155100
Department Name	CHEMICAL ENGINEERING RESEARCH

### Project Information

Project ID:	10003553	Project Description:	Fundamental Studies of Bimetal	PI Name:	JOHN MONNIER
Start Date:	03/01/2014	End Date:	09/30/2016	Indirect Cost Rate:	46.50
Grant Number:	TME&MNA INC	Dept/Fund	15510UB08	Project Status	Active

Transaction Detail	Budget	Expense	PreEnoumbrance	Enoumbrance	Remaining Balance
51000-SALARIES	\$38,500.00	\$0.00	\$0.00	\$0.00	\$38,500.00
51320-RESEARCH FAC POST DOCTORAL APP	\$0.00	\$27,272.72	\$0.00	\$0.00	(\$27,272.72)
51363-GRADUATE RESEARCH ASST SUMMER	\$0.00	\$12,500.04	\$0.00	\$0.00	(\$12,500.04)
51900-FRINGE BENEFITS	\$4,609.00	\$2,347.62	\$0.00	\$0.00	\$2,261.38
52010-FREIGHT, EXPRESS AND DELIVERIES	\$0.00	\$54.61	\$0.00	\$0.00	(\$54.61)
52021-NON USC EMPLOY TRAVEL CONSULTA	\$0.00	\$758.70	\$0.00	\$0.00	(\$758.70)
52024-USC EMPLOYEE TRAVEL DOMESTIC	\$0.00	\$2,384.81	\$0.00	\$0.00	(\$2,384.81)
52070-CONTRACTUAL SERVICES	\$0.00	\$3,735.00	\$0.00	\$0.00	(\$3,735.00)
53000-SUPPLIES	\$11,500.00	\$0.00	\$0.00	\$0.00	\$11,500.00
53002-EDUCATIONAL SUPPLIES	\$0.00	\$9,625.80	\$0.00	\$0.00	(\$9,625.80)
54013-RENTS-NON DATA PROCESSING EQUI	\$0.00	\$782.12	\$0.00	\$0.00	(\$782.12)
54625-GRADUATE ASSISTANT TUITION SUP	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00
<b>Total Direct Cost</b>	<b>\$84,809.00</b>	<b>\$68,481.42</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$6,147.68</b>
<b>Total Indirect Cost</b>	<b>\$26,393.00</b>	<b>\$33,038.81</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$7,846.81)</b>
<b>Total Cost</b>	<b>\$80,992.00</b>	<b>\$82,600.93</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$2,488.03)</b>

### Cost Share

Cost share	Budget	Actuals	Balance
Total Direct Cost Share	\$0.00	\$0.00	\$0.00
Total Indirect Cost Share	\$0.00	\$0.00	\$0.00
<b>Total Cost Share</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

# Exercise: Grants Dashboard Report

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- Acctg Date From / To – 01/01/1901, 7/31/2016
- Award ID CON0000937
- Project Status - All

# Questions

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# Who to Contact for Help?



- Depends on the data being reviewed.

Pre-encumbrances & Encumbrances	Purchasing Department	<a href="mailto:purchasing@sc.edu">purchasing@sc.edu</a>
AP Vouchers, Payments	Accounts Payable	<a href="mailto:accountspayable@sc.edu">accountspayable@sc.edu</a>
Journal Entries, RQs, etc.	General Accounting	<a href="mailto:generalaccounting@sc.edu">generalaccounting@sc.edu</a>
Sponsored Awards, Sponsored Projects, Cost Share, Actuals, Direct Costs, Indirect Cost, etc.	Contracts & Grants Department	<a href="mailto:cggrants@mailbox.sc.edu">cggrants@mailbox.sc.edu</a>
Error message while attempting to drill down into a page	PeopleSoft Access	<a href="mailto:pssecure@mailbox.sc.edu">pssecure@mailbox.sc.edu</a>

# Survey

- Located at the top of the In-Person Training page.

## In-Person Training

### Please note:

- For information about a class you're interested in attending, please email the PeopleSoft Training Team at [PSTRAIN@mailbox.sc.edu](mailto:PSTRAIN@mailbox.sc.edu).
- Please click [here](#) to access the PeopleSoft survey.

## PeopleSoft Training Schedule - Session Dates and Times

What	When	How Long	Where
Query Viewer (Webinar)	Monday, June 6 10-11:30am	1.5 hours	Online (webinar)
Requisition and Receiving Training	Tuesday, June 7 9am - 3pm	5 hours	University Technology Services 1244 Blossom Street, Room 301A



# Thanks for attending !

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