



Controller’s Office - Finance Intranet Reporting
Using the Non-USCSP Project Dashboard Reporting Tool

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I. Objectives

By the end of this procedure, you should be able to use the Non-USCSP Project Dashboard to:

- maintain positive cash balances in your internal projects (USCIP), student activity projects (USCSA), and spendable endowment projects (USCEN) by showing current cash balances, outstanding encumbrances, and project end dates.
- view projects that have ended or are ending.

II. Tips, Tricks and Reminders

Here are few tips and tricks that will help when using this tool:

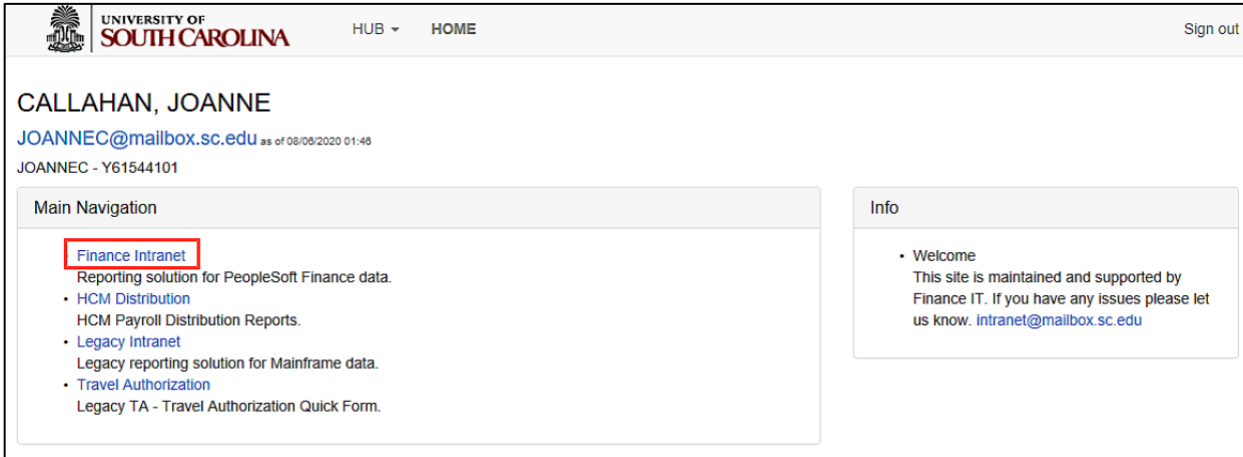
- Projects that are in yellow are inactive.
- Projects that have ended need to either be extended or closed out and inactivated. To request a project extension, contact CFMAINT@mailbox.sc.edu.

III. Navigation

To access this new tool, go to <https://www.admin.sc.edu/>.

Then navigate to: **Finance Intranet > Non-USCSP Project Dashboard**

Step 1: Click the **Finance Intranet** link.



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CALLAHAN, JOANNE
 JOANNEC@mailbox.sc.edu as of 08/08/2020 01:46
 JOANNEC - Y61544101

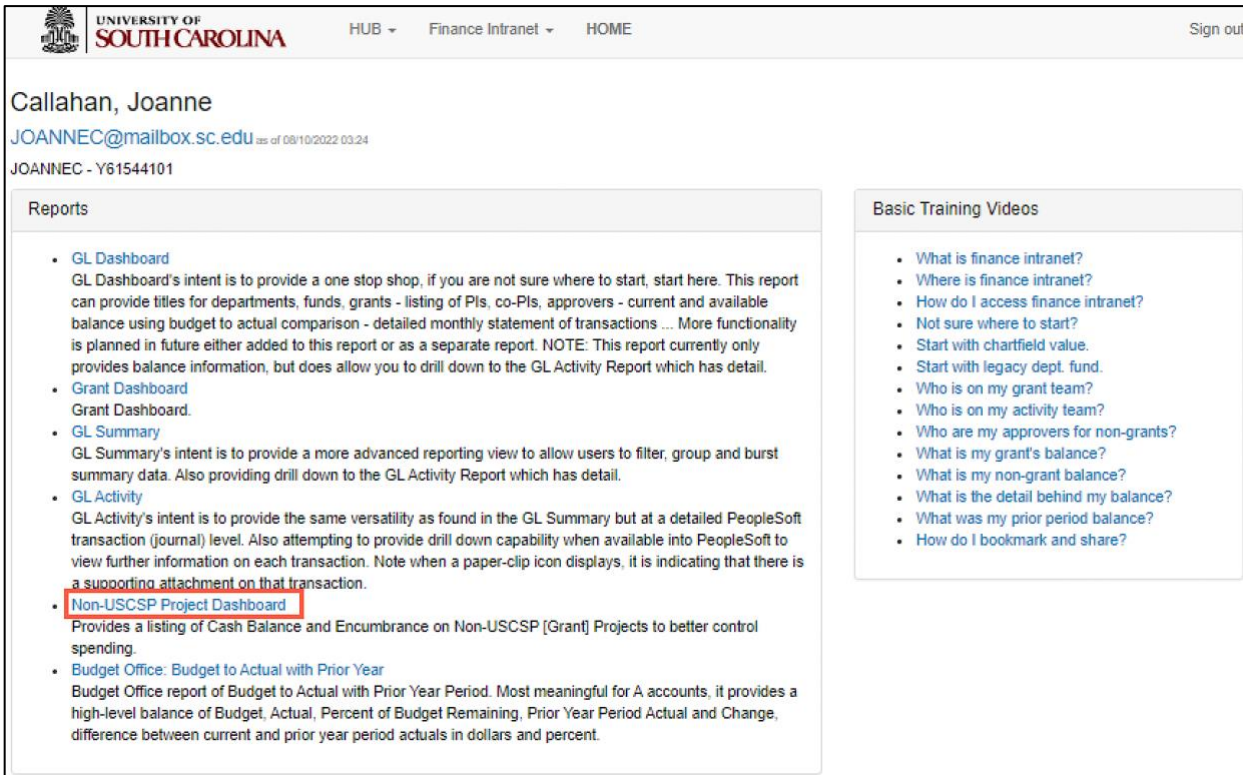
Main Navigation

- Finance Intranet**
Reporting solution for PeopleSoft Finance data.
- HCM Distribution
HCM Payroll Distribution Reports.
- Legacy Intranet
Legacy reporting solution for Mainframe data.
- 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

Step 2: Click the **Non-USCSP Project Dashboard** link.



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Callahan, Joanne
 JOANNEC@mailbox.sc.edu as of 08/10/2022 03:24
 JOANNEC - Y61544101

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.
- **Non-USCSP Project Dashboard**
Provides a listing of Cash Balance and Encumbrance on Non-USCSP [Grant] Projects to better control spending.
- 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?
- Who are my approvers for non-grants?
- What is my grant's balance?
- What is my non-grant balance?
- What is the detail behind my balance?
- What was my prior period balance?
- How do I bookmark and share?

Users will have access to the same departments/projects as they currently have in Finance Intranet.

IV. View Project End Dates by Operating Unit

Step 1: Click in the **Operating Unit** field and enter an applicable operating unit.

Step 2: Click the **Total** drop-down arrow and select **Project End Date** from the list.

Step 3: Click the **Submit** button.

The screenshot shows the 'NON-USCSP PROJECT DASHBOARD' interface. It includes a header with the University of South Carolina logo and navigation links. The main area contains several input fields: 'Operating Unit' (with 'CL034' entered), 'Department', 'Fund', 'Project BU', 'Project', and 'Project Status' (set to 'All'). A 'Total' dropdown menu is open, displaying options: 'None', 'Operating Unit', 'Fund', 'PC Business Unit', and 'Project End Date' (which is highlighted with a red box). Below the filters are three buttons: 'Submit' (highlighted with a red box), 'Clear', and 'CSV'.

Step 4: All the Non-USCSP Projects (USCIP, USCSA, and USCEN) will return for the Operating Unit entered. The returned results include the Project number, Type of Non-USCSP project, Status and End Date. Notice Inactive projects are highlighted in yellow.

GL-Current [OPEN] as of 08/10/2022 04:26

Project	PCBU	Project Name	Status	End Date	Op.Unit	Fund	Cash	Encumbrances	Balance	
80002301	USCIP	ASP BEHROOZMAND-UNDERSTAND EFF	INACTIVE	09/30/2018	CL034	EN800		25.00	(25.00)	
END 09/30/2018 TOTAL								25.00	(25.00)	
80002288	USCIP	ASPIRE - VEJERANO	INACTIVE	09/30/2019	CL034	EN800		256.00	(256.00)	
END 09/30/2019 TOTAL								256.00	(256.00)	
80002455	USCIP	ALICIA FLACH STARTUP	ACTIVE	12/31/2021	CL034	EN300	(1.56)		(1.56)	
80004053	USCIP	EXAMNG EFFECTS AFTR SCHL PHYSI	INACTIVE	12/31/2021	CL034	N1100	(2,750.00)		(2,750.00)	
END 12/31/2021 TOTAL								(2,751.56)	(2,751.56)	
80003874	USCIP	FILTON - RESEARCH INCENTIVE	ACTIVE	01/31/2022	CL034	N1700	(2,517.23)		(2,517.23)	
END 01/31/2022 TOTAL								(2,517.23)	(2,517.23)	
80003600	USCIP	SPARC: Charles Smith: Effect o	ACTIVE	06/30/2022	CL034	N1400	(126.81)		(126.81)	
80003739	USCIP	LINKING CORTICAL SENSORIMOTOR	ACTIVE	06/30/2022	CL034	N1600				
80003742	USCIP	CAPTURING PHYSCL ACTVTV SYMPTM	ACTIVE	06/30/2022	CL034	N1600	468.90		468.90	
80004230	USCIP	PATE PAPH INCENTIVE	ACTIVE	06/30/2022	CL034	N1700	2,671.01	45,993.75	(43,322.74)	
80004242	USCIP	mHEALTH INTERVENTION REDUCE SE	ACTIVE	06/30/2022	CL034	N1200	(5,214.09)		(5,214.09)	
80004554	USCIP	RACIAL DIFFERENCES IN COMORBID	ACTIVE	06/30/2022	CL034	N1200	(17.43)		(17.43)	
80004555	USCIP	SPANISH-ENGLISH BILINGUAL EDUC	INACTIVE	06/30/2022	CL034	N1200				
END 06/30/2022 TOTAL								(2,218.42)	45,993.75	(48,212.17)
80004142	USCIP	SPARC:K CORREA:TRANSCRIPTOME	ACTIVE	07/31/2022	CL034	N1400	243.00		243.00	
80004143	USCIP	SPARC:M OZA:TUMOR INFILTRATING	ACTIVE	07/31/2022	CL034	N1400	(4,974.00)		(4,974.00)	
80004147	USCIP	SPARC: T MI:IMPACT INTERSECTIO	ACTIVE	07/31/2022	CL034	N1400	(273.32)		(273.32)	
END 07/31/2022 TOTAL								(5,004.32)		(5,004.32)

Optional: To narrow down your search results you can select **Active/Inactive** from the **Project Status** drop-down menu.

The screenshot shows the 'NON-USCSP PROJECT DASHBOARD' with the following search filters:

- Operating Unit:** CL034
- Department:** (empty)
- Fund:** (empty)
- Project BU:** (empty)
- Project:** (empty)
- Project Status:** All (dropdown menu is open, showing 'All', 'Active', and 'Inactive' options)
- Total:** Project End Date (dropdown menu)
- Fiscal Period:** GL Current [OPEN] (dropdown menu)

V. Review Balances by Fund “Letter” and PC Business Unit

Step 1: Click in the **Operating Unit** field and enter an applicable operating unit.

Step 2: Click in the **Fund** field and enter the first letter of the Fund type and the % sign (wildcard).

Step 3: Click in the **Project BU** field and enter the **Non-USCSP Project** (USCIP, USCSA, and USCEN) type you would like to review the balances for.

Step 4: Click the **Total** drop-down arrow and select **Fund** from the list.

Step 5: Click the **Submit** button.

The screenshot shows the 'NON-USCSP PROJECT DASHBOARD' with the following search filters:

- Operating Unit:** CL032
- Department:** (empty)
- Fund:** E%
- Project BU:** USCIP
- Project:** (empty)
- Project Status:** All
- Total:** Fund (dropdown menu is open, showing 'Fund', 'None', 'Operating Unit', 'PC Business Unit', and 'Project End Date' options)

Buttons: Submit, Clear, CSV

Step 6: Review the balances by fund letter for the Non-USCSP project type entered.

GL-Current [OPEN] as of 08/10/2022 04:26									
Project	PCBU	Project Name	Status	End Date	Op.Unit	Fund	Cash	Encumbrances	Balance
80001355	USCIP	START-UP FUNDS - BUCKHAULTS	ACTIVE	08/30/2050	CL032	EN300	(21,028.29)		(21,028.29)
80001743	USCIP	START-UP FUNDS - KIARIS	ACTIVE	08/30/2050	CL032	EN300	(32,869.10)		(32,869.10)
80001840	USCIP	STARTUP FUNDS MATHEW	ACTIVE	04/30/2023	CL032	EN300	7,956.04		7,956.04
80001896	USCIP	STARTUP BRYAN LOVE	ACTIVE	08/30/2030	CL032	EN300	(2,587.70)		(2,587.70)
80002545	USCIP	START UP FUNDS-SAHIN	ACTIVE	01/31/2023	CL032	EN300	(19,257.07)		(19,257.07)
EN300 TOTAL							(67,584.12)		(67,584.12)

Step 7: Click the **Project's** hyperlink to drill down into the GL Summary to see an all-account summary for that specific project.

GL-Current [OPEN] as of 08/10/2022 04:26									
Project	PCBU	Project Name	Status	End Date	Op.Unit	Fund	Cash	Encumbrances	Balance
80001355	USCIP	START-UP FUNDS - BUCKHAULTS	ACTIVE	08/30/2050	CL032	EN300	(21,028.29)		(21,028.29)
80001743	USCIP	START-UP FUNDS - KIARIS	ACTIVE	08/30/2050	CL032	EN300	(32,869.10)		(32,869.10)
80001840	USCIP	STARTUP FUNDS MATHEW	ACTIVE	04/30/2023	CL032	EN300	7,956.04		7,956.04
80001896	USCIP	STARTUP BRYAN LOVE	ACTIVE	08/30/2030	CL032	EN300	(2,587.70)		(2,587.70)
80002545	USCIP	START UP FUNDS-SAHIN	ACTIVE	01/31/2023	CL032	EN300	(19,257.07)		(19,257.07)
EN300 TOTAL							(67,584.12)		(67,584.12)

Note: Results can be exported from the Non-USCSP Project Dashboard into Excel to filter, sort or consolidate as needed by clicking the **CVS** button.

VI. Review Projects by Type

Step 1: Click in the **Operating Unit** field and enter an applicable operating unit.

Step 2: Click in the **Fund** field and enter the % sign (wildcard) in place of the fund letter to return projects for that category. In this example, %700 will return all incentive projects.

Step 3: Click in the **Project BU** field and enter the **Non-USCSP Project** (USCIP, USCSA, and USCEN) type you would like to review the balances for.

Step 4: Click the **Total** drop-down arrow and select **Fund** from the list.

Step 5: Click the **Submit** button.

The screenshot shows the 'NON-USCSP PROJECT DASHBOARD' interface. At the top, there is a navigation bar with 'UNIVERSITY OF SOUTH CAROLINA', 'HUB', 'Finance Intranet', and 'NON-USCSP PROJECT DASHBOARD' (with a 'Sign out' link). Below this are several input fields: 'Operating Unit' (containing 'CL032'), 'Department' (empty), 'Fund' (containing '%700'), 'Project BU' (containing 'USCIP'), 'Project' (empty), and 'Project Status' (containing 'All'). To the right, a 'Total' dropdown menu is open, showing options: 'Fund', 'None', 'Operating Unit', 'Fund' (highlighted with a red bar), 'PC Business Unit', and 'Project End Date'. At the bottom, there are three buttons: 'Submit' (highlighted with a red box), 'Clear', and 'CSV'.

Step 6: Review the balances by category.

Project	PCBU	Project Name	Status	End Date	Op.Unit	Fund	Cash	Encumbrances	Balance
80000272	USCIP	RESEARCH INCENTIVE - POWELL	ACTIVE	08/30/2050	CL032	EN700	(2,149.17)		(2,149.17)
80000282	USCIP	RESEARCH INCENTIVE - MCGEE	ACTIVE	08/30/2050	CL032	EN700	(1,802.80)		(1,802.80)
80000290	USCIP	RESEARCH INCENTIVE-WYATT	ACTIVE	08/30/2050	CL032	EN700	(951.29)		(951.29)
80000301	USCIP	RESEARCH INCENTIVE - MICHELS	ACTIVE	08/30/2050	CL032	EN700	(42,736.58)		(42,736.58)
80000312	USCIP	RESEARCH INCENTIVE - BLAKE	ACTIVE	08/30/2050	CL032	EN700	(4,912.44)		(4,912.44)
80000323	USCIP	RESCH INCENT - B BOOKSTAVER	ACTIVE	08/30/2050	CL032	EN700	(3,133.41)		(3,133.41)
80000334	USCIP	RESEARCH INCENTIVE- MOORE	ACTIVE	08/30/2050	CL032	EN700	(12,150.00)		(12,150.00)
80000343	USCIP	RESEARCH INCENTIVE- RUDISILL	ACTIVE	08/30/2050	CL032	EN700	(1,252.34)		(1,252.34)
80000360	USCIP	RESEARCH INCENTIVE - ZHU	ACTIVE	08/30/2050	CL032	EN700	1,172.50		1,172.50
80000367	USCIP	RESEARCH INCENTIVE - XU	ACTIVE	08/30/2050	CL032	EN700	1,838.45		1,838.45
80000368	USCIP	RESCH INCENT - STAFKEY-MAILEY	ACTIVE	08/30/2050	CL032	EN700	(100.00)		(100.00)
80000375	USCIP	RESEARHD INCENTIVE - CREEK	ACTIVE	08/30/2050	CL032	EN700	(5,080.45)		(5,080.45)
80000381	USCIP	RESEARCH INCENTIVE - RONINSON	ACTIVE	08/30/2050	CL032	EN700	(13,505.28)		(13,505.28)
80000389	USCIP	RESEARHD INCENTIVE - DUNN	ACTIVE	08/30/2050	CL032	EN700	(1,630.00)		(1,630.00)
80000396	USCIP	RESEARCH INCENTIVE - PIRO	ACTIVE	08/30/2050	CL032	EN700	(4,956.07)		(4,956.07)
80000402	USCIP	RESEARCH INCENTIVE - LOVE	ACTIVE	08/30/2050	CL032	EN700	(989.69)		(989.69)
80000414	USCIP	RESEARCH INCENTIVE- LU	ACTIVE	08/30/2050	CL032	EN700	(3,842.49)		(3,842.49)
80000422	USCIP	RESEARCH INCENTIVE - TURNER	ACTIVE	08/30/2050	CL032	EN700	(406.00)		(406.00)
80000429	USCIP	RESEARCH INCENTIVE - JUSTO	ACTIVE	08/30/2050	CL032	EN700	(450.00)		(450.00)
80000438	USCIP	RESEARCH INCENTIVE - ALMGREN	ACTIVE	08/30/2050	CL032	EN700	(1,385.25)		(1,385.25)
80000528	USCIP	RESEARCH INCENTIVE - CHEN	ACTIVE	08/30/2050	CL032	EN700	56.81		56.81
80001352	USCIP	RESEARCH INCENTIVE- BIAN	ACTIVE	08/30/2050	CL032	EN700	(584.89)		(584.89)
80001353	USCIP	RESEARCH INCENTIVE - SHTUTMAN	ACTIVE	08/30/2050	CL032	EN700	(2,962.12)		(2,962.12)
80002044	USCIP	PHARMACY DEANS ACCT	ACTIVE	08/30/2030	CL032	EN700	(409,000.00)		(409,000.00)
80002514	USCIP	XCENDA SUPPORT	ACTIVE	08/31/2050	CL032	EN700	(2,296.28)		(2,296.28)
80002577	USCIP	RESEARCH INCENTIVE-AMICK	ACTIVE	08/30/2050	CL032	EN700	(3,504.25)		(3,504.25)
EN700 TOTAL							(1,375,210.10)	17,089.32	(1,392,299.42)

Step 7: Click the **Project's** hyperlink to drill down into the GL Summary to see an all-account summary for that specific project.

Project	PCBU	Project Name	Status	End Date	Op.Unit	Fund	Cash	Encumbrances	Balance
80000272	USCIP	RESEARCH INCENTIVE - POWELL	ACTIVE	09/30/2050	CL032	EN700	(2,149.17)		(2,149.17)
80000282	USCIP	RESEARCH INCENTIVE - MCGEE	ACTIVE	09/30/2050	CL032	EN700	(1,602.80)		(1,602.80)
80000290	USCIP	RESEARCH INCENTIVE-WYATT	ACTIVE	09/30/2050	CL032	EN700	(951.29)		(951.29)
80000301	USCIP	RESEARCH INCENTIVE - MICHELS	ACTIVE	09/30/2050	CL032	EN700	(42,736.58)		(42,736.58)
80000312	USCIP	RESEARCH INCENTIVE - BLAKE	ACTIVE	09/30/2050	CL032	EN700	(4,912.44)		(4,912.44)
80000323	USCIP	RESECH INCENT - B BOOKSTAVER	ACTIVE	09/30/2050	CL032	EN700	(3,133.41)		(3,133.41)
80000334	USCIP	RESEARCH INCENTIVE- MOORE	ACTIVE	09/30/2050	CL032	EN700	(12,150.00)		(12,150.00)
80000343	USCIP	RESEARCH INCENTIVE- RUDISILL	ACTIVE	09/30/2050	CL032	EN700	(1,252.34)		(1,252.34)
80000360	USCIP	RESEARCH INCENTIVE - ZHU	ACTIVE	09/30/2050	CL032	EN700	1,172.50		1,172.50
80000367	USCIP	RESEARCH INCENTIVE - XU	ACTIVE	09/30/2050	CL032	EN700	1,838.45		1,838.45
80000368	USCIP	RESECH INCENT - STAFKEY-MAILEY	ACTIVE	09/30/2050	CL032	EN700	(100.00)		(100.00)
80000375	USCIP	RESEARHD INCENTIVE - CREEK	ACTIVE	09/30/2050	CL032	EN700	(5,080.45)		(5,080.45)
80000381	USCIP	RESEARCH INCENTIVE - RONINSON	ACTIVE	09/30/2050	CL032	EN700	(13,505.28)		(13,505.28)
80000389	USCIP	RESEARHD INCENTIVE - DUNN	ACTIVE	09/30/2050	CL032	EN700	(1,630.00)		(1,630.00)
80000396	USCIP	RESEARCH INCENTIVE - PIRO	ACTIVE	09/30/2050	CL032	EN700	(4,956.07)		(4,956.07)
80000402	USCIP	RESEARCH INCENTIVE - LOVE	ACTIVE	09/30/2050	CL032	EN700	(989.69)		(989.69)
80000414	USCIP	RESEARCH INCENTIVE- LU	ACTIVE	09/30/2050	CL032	EN700	(3,842.49)		(3,842.49)
80000422	USCIP	RESEARCH INCENTIVE - TURNER	ACTIVE	09/30/2050	CL032	EN700	(406.00)		(406.00)
80000429	USCIP	RESEARCH INCENTIVE - JUSTO	ACTIVE	09/30/2050	CL032	EN700	(450.00)		(450.00)
80000438	USCIP	RESEARCH INCENTIVE - ALMGREN	ACTIVE	09/30/2050	CL032	EN700	(1,385.25)		(1,385.25)
80000528	USCIP	RESEARCH INCENTIVE - CHEN	ACTIVE	09/30/2050	CL032	EN700	56.81		56.81
80001352	USCIP	RESEARCH INCENTIVE- BIAN	ACTIVE	09/30/2050	CL032	EN700	(584.89)		(584.89)
80001353	USCIP	RESEARCH INCENTIVE - SHTUTMAN	ACTIVE	09/30/2050	CL032	EN700	(2,962.12)		(2,962.12)
80002044	USCIP	PHARMACY DEANS ACCT	ACTIVE	09/30/2030	CL032	EN700	(409,000.00)		(409,000.00)
80002514	USCIP	XCENDA SUPPORT	ACTIVE	09/31/2050	CL032	EN700	(2,296.28)		(2,296.28)
80002577	USCIP	RESEARCH INCENTIVE-AMICK	ACTIVE	09/30/2050	CL032	EN700	(3,504.25)		(3,504.25)
EN700 TOTAL							(1,375,210.10)	17,089.32	(1,392,299.42)

Note: Results can be exported from the Non-USCSP Project Dashboard into Excel to filter, sort or consolidate as needed by clicking the **CVS** button.