



**Office of the Controller**  
**Operational Management & Reporting**  
**Grant Dashboard – Drilling Down into the Details (Expenses and Payroll)**

The Grant Dashboard provides the ability to:

- Search by: PI, Contract, and Project (USCSP and USCIP).
- View expenses grouped in the categories as shown on the Standard USC Invoice submitted to sponsors.
- Expand categories to show detail account codes similar to the GL Dashboard and drill into the transaction.

When using the Grant Dashboard be sure to:

- Always select a **Fiscal Period**.
- Use the **Display Account Chartfield** checkbox to view account information.
- Remember, you can drill down into any of the expenses, including payroll.
  - Hyperlinks will take you to PeopleSoft for expenses or HCM Distribution for payroll

To access the Grant Dashboard, go to <https://financeintranet.sc.edu>. **This is the preferred tool when reviewing grants.**

**Navigation: HUB > Finance Intranet > Grant Dashboard**

The screenshot shows the Grant Dashboard search interface. At the top, there is a navigation bar with the University of South Carolina logo, 'HUB', 'Finance Intranet', and 'GRANT DASHBOARD' (highlighted with a red box). A 'Sign out' link is also present. Below the navigation bar, there are three columns of search criteria:

- Operating Unit:** Department, Fund, Contract (all text input fields).
- Project:** Project (text input), Project Status (dropdown menu with 'Active' selected), PI (text input), 'Include Co-PI in Criteria above' (checkbox), Business Manager (BM) (text input), and Sponsor (text input).
- Class:** Class (text input), Fiscal Period (dropdown menu with 'GL Current [OPEN]' selected), 'Display Account Chartfield' (checkbox), and Output (dropdown menu with 'Detail' selected).

At the bottom of the search area, there are three buttons: 'Submit', 'Clear', and 'CSV'. In the bottom right corner, there is a copyright notice: '© University of South Carolina 0s'.

In the **Search Criteria** section, you can search by:

- Contract, Project, PI, or Sponsor (Search by **Contract** for larger accounts)
- Select a specific **Fiscal Period**
- **Display Account Chartfield** to drill down into the Categories to see related accounts

For the examples below, we searched by **Project** for fiscal period **2324 April** and selected **Display Account Chartfield** to drill down into the categories.

The screenshot shows the 'GRANT DASHBOARD' search criteria form. The form is organized into three columns. The left column contains input fields for 'Operating Unit', 'Department', 'Fund', and 'Contract'. The middle column contains input fields for 'Project' (with value '10012715'), 'Project Status' (dropdown menu with 'Active' selected), 'PI', a checkbox for 'Include Co-PI in Criteria above', 'Business Manager (BM)', and 'Sponsor'. The right column contains input fields for 'Class', 'Fiscal Period' (dropdown menu with 'GL 2324 007-January' selected), a checkbox for 'Display Account Chartfield' (which is checked and highlighted with a red box), and an 'Output' dropdown menu (with 'Detail' selected). At the bottom of the form are three buttons: 'Submit', 'Clear', and 'CSV'.

Below is a screenshot of the returned data.

Notice selecting **Display Account Chartfield**:

- Gives you the ability to view accounts within each category based on the invoice submitted to the sponsor.
- Useful for when sponsors question expenses.
- Provides a way to review expenses and reconcile accounts within 30 days of the project end date.

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Pre-Encumbrances	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	29,380.00			29,380.00			29,380.00			
51300 UNCLASSIFIED EMPLOYEES		1,175.98	12,538.18	(12,538.18)			(12,538.18)			
SALARIES	29,380.00	1,175.98	12,538.18	16,841.82			16,841.82			
51900 FRINGE BENEFITS		447.95	4,334.94	(4,334.94)			(4,334.94)			
51995 FRINGE EXPENSES BUDGET	10,378.00			10,378.00			10,378.00			
FRINGE BENEFITS	10,378.00	447.95	4,334.94	6,043.06			6,043.06			
52024 USC EMPLOYEE TRAVEL	2,288.00			2,288.00			2,288.00			
55120 USC EMPLOYEE TRAVEL										
TRAVEL	2,288.00			2,288.00			2,288.00			
54034 BINDING LEASES-NON STATE-OWNED	1,484.00			1,484.00			1,484.00			
56215 RIGHT TO USE EQUIPMENT			731.00	(731.00)			(731.00)			
56220 RIGHT TO USE BUILDING AND IMPR										
FIXED CHARGES	1,484.00		731.00	753.00			753.00			
DIRECT EXPENSE	43,530.00	1,623.93	17,604.12	25,925.88			25,925.88			
59990 INDIRECT COST RECOVERY	10,931.00	422.22	4,386.98	6,544.02			6,544.02			
INDIRECT COST RECOVERY	10,931.00	422.22	4,386.98	6,544.02			6,544.02			
INDIRECT EXPENSE	10,931.00	422.22	4,386.98	6,544.02			6,544.02			
TOTAL EXPENSE	54,461.00	2,046.15	21,991.10	32,469.90			32,469.90			

This reporting tool provides the ability to drill down into the details. Clicking a amount will take you to the **GL Activity** screen where you can see the transactions that make up that amount.

Clicking the **Travel** hyperlink takes you to the **GL Activity** page.

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\_STATUS, '[PUJ]') 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
<b>- TOTAL</b>				(327.82)		

On the **GL Activity** page, click into the **Reference** link to see the expense details.

**GL Activity** FP <= 010 AND REGEXP\_LIKE( JOURNAL\_STATUS, '[PUJ]') AND INVOICE\_TREE LIKE '%SUPPLIES%' AND (PROJECT LIKE '10008822%' OR OLD\_PROJECT LIKE '10008822%')

ACTUAL1920 as of 08/07/2020 02:32

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
<b>- TOTAL</b>				(327.82)		

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

Download results in: Excel Spreadsheet CSV Text File XML File (6 kb)

View All

Row	Expense Report	Report Description	Employee ID	Name	Expense Date	Line	Dist Line	Expense Type	Ticket Number	Distance	Merchant	Line Description	GL Unit	Oper Unit	Department	Fund	Account Class	PC Bus Unit	Project	Activity	Cost Share	Expense Line Amt	Created On	Travel Auth ID	Advance ID	Amount Applied	Distribution Status	Location	Accty Date	Budget Header Status	Budget Line Status	Exception Type
1	3000042683	August 2019 Statement	H07800489	Jenkins, Leslie M.	08/20/2019	1		OTHER SUPPLIES		0.00	AMZN Mktp US	Other supplies	USC01	CL039	152100	K1000	53009	202	USCSP	10009355	1	47.700	10/24/2019			Distributed	10/24/2019	Valid	Valid			
2	3000042683	August 2019 Statement	H07800489	Jenkins, Leslie M.	08/20/2019	2		OTHER SUPPLIES		0.00	AMZN Mktp US	Other supplies	USC01	CL039	152100	K1000	53009	202	USCSP	10009355	1	365.690	10/24/2019			Distributed	10/24/2019	Valid	Valid			
3	3000042683	August 2019 Statement	H07800489	Jenkins, Leslie M.	08/21/2019	3		DATA PROCESSING SUPPLIES		0.00	AMZN Mktp US	Data processing supplies	USC01	CL039	152400	F1000	53004	301	USCSP	10008822	1	227.820	10/24/2019			Distributed	10/24/2019	Valid	Valid			
4	3000042683	August 2019 Statement	H07800489	Jenkins, Leslie M.	08/23/2019	4		OTHER SUPPLIES		0.00	FLAGHOUSE INC	Other supplies	USC01	CL039	152100	K1000	53009	202	USCSP	10009355	1	1213.960	10/24/2019			Distributed	10/24/2019	Valid	Valid			

**NOTE:** Notice in the screenshot above, only the 3rd line on the expense report was charged to project ID 10008822. It is important to look at the accounting information very closely to ensure you are looking at the information that pertains to your specific project.

On the **GL Activity** page, click the **Journal ID** to view the journal lines and attachments.

GL Activity		FP <= 012 AND REGEXP_LIKE( JOURNAL_STATUS, 'PUJ' ) 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- - -	<a href="#">EXA0088005</a>	10/24/2019	10/24/2019	227.82	Expense Accruals	<a href="#">SHT3000042683</a>	EX
Jenkins, Leslie M.	Jenkins, Leslie M.	PCARD2469216923310077536999-22106008229					
1920-5 CL039-152400-F1000-53031-301-10008822-1- - -	<a href="#">0000089986</a>	11/25/2019	11/26/2019	100.00	TRANSTOTALID: 321059 - PURCHAS	RQ11867	ONL
- TOTAL				(327.82)			

UNIVERSITY OF SOUTH CAROLINA

Journal ID: 0000089986 Date: 11/25/2019

Unit: USC01

Long Description: DoIT - Software Billing November 2019 (217 characters remaining)

\*Ledger Group: ACTUALS Adjusting Entry: Non-Adjusting Entry

Ledger: Fiscal Year: 2020

\*Source: ONL Period: 5

Reference Number: ADB Date: 11/25/2019

Journal Class: Transaction Code: GENERAL

SJE Type:  Auto Generate Lines

Currency Defaults: USD / CRRNT / 1  Save Journal Incomplete Status

Attachments (1)  Autobalance on 0 Amount Line

Reversal: Do Not Generate Reversal  CTA

Entered By: JOHNSTTT Commitment Control

Entered On: 11/25/2019 1:24:51PM Tiffany Johnston

Last Updated On: 11/26/2019 10:19:34AM

Buttons: Save, Return to Search, Notify, Refresh, Add, Update/Display

To drill down into payroll detail, click one of the **Salary** account links in the Grant Dashboard. This takes you to the **GL Activity** page.

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		1,115.84	5,021.27	(5,021.27)		(5,021.27)			
51300 UNCLASSIFIED EMPLOYEES		3,883.06	42,052.19	(42,052.19)		(42,052.19)	22,990.80		(22,990.80)
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									
<b>SALARIES</b>	<b>64,018.00</b>	<b>4,998.90</b>	<b>55,996.15</b>	<b>8,021.85</b>		<b>8,021.85</b>	<b>35,511.00</b>	<b>28,685.58</b>	<b>6,825.42</b>

**GL Activity** FP = 012 AND REGEXP\_LIKE( JOURNAL\_STATUS, 'PU' ) AND a.ACCOUNT LIKE '51200%' AND (PROJECT LIKE '10008822%' OR OLD\_PROJECT LIKE '10008822%')

ACTUAL1920 as of 08/19/2020 02:19

Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
PAY0101523	06/11/2020	06/15/2020	557.92	HR Payroll Journals	>>HCM	PAY
PAY0102721	06/26/2020	06/28/2020	557.92	HR Payroll Journals	>>HCM	PAY
<b>- TOTAL</b>			(1,115.84)			

On the **GL Activity** page, click the **HCM** link. This takes you to **HCM Distribution**. For more detailed information on how to use the HCM Distribution reporting tool, please visit the [Grants and Funds Management](#) webpage where you will find a recorded webinar and job aid.

**GL Activity** FP = 012 AND REGEXP\_LIKE( JOURNAL\_STATUS, 'PU' ) AND a.ACCOUNT LIKE '51200%' AND (PROJECT LIKE '10008822%' OR OLD\_PROJECT LIKE '10008822%')

ACTUAL1920 as of 08/19/2020 02:19

Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
PAY0101523	06/11/2020	06/15/2020	557.92	HR Payroll Journals	>>HCM	PAY
PAY0102721	06/26/2020	06/28/2020	557.92	HR Payroll Journals	>>HCM	PAY
<b>- TOTAL</b>			(1,115.84)			

NAME	USCID	FISCAL PERIOD: JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	ACCOUNT	LBR \$	LBR %	TAX	RETIRE	LIFE	LTD	HEALTH	DENTAL	FRNG \$	FRNG %	TOT \$
		1920-12: PAY0101523	UG85	152400	T12	06/15/2020	8000397409	06/15/2020	A00000001613	CL039-152400-F1000-301-10008822-	51200	557.92	20.92%	42.69	121.68					164.37	29.46%	722.29
<b>TOTAL</b>												557.92	42.69	121.68			164.37	29.46%	722.29			