



Controller's Office - Grants and Funds Management

Using the Grant Dashboard Reporting Tool

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I. Objectives

By the end of this procedure, you should be able to:

- Compare the PeopleSoft invoice to the information provided in the dashboard
- Select useful search criteria
- Review/understand the returned data
- Drill down into the expense details and journal IDs

II. Tips, Tricks and Reminders

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

- The information in the Grants Dashboard should match the invoice created in Finance PeopleSoft unless a Sponsor requires the use of their own invoice template.
- Important to reconcile and finalize all expenses within 30 days of the project end date. (The **only** exception would be for sub awards that have 60 days to issue their final invoice.)
- Regularly review salary and effort, and make any necessary adjustments timely.
- To drill down into payroll expenses, continue to use the HCM Distribution tool as this capability is currently not available in the dashboard.

III. Navigation

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

Then navigate to: **Finance Intranet > Grant Dashboard**

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

UNIVERSITY OF SOUTH CAROLINA HUB HOME Sign out

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 **Grant Dashboard** link.

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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.
- 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.

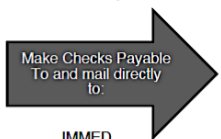
Basic Training Videos

- 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. Comparing the PeopleSoft Invoice with the Grant Dashboard

Below is a screenshot of a PeopleSoft Standard Invoice:

 UNIVERSITY OF SOUTH CAROLINA	INVOICE NO. CGA0054577	
University of South Carolina May 15, 2020 USDE - Drawdown USDE - Drawdown 400 Maryland Ave, SW Washington DC 20202 USA	 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	BEGIN DATE:	1/1/19
GRANT NUMBER:	H325D180021	END DATE:	12/31/20
PRINCIPAL INVESTIGATOR:	Plotner,Anthony Jason		

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 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

PROJECT ID: 10008822 DEPT ID: 152400 BILLER: Kimberly Welp	Billing Authority: University of South Carolina Mandy Kibler, Controller  billing@mailbox.sc.edu
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Below is a screenshot comparing the invoice to the dashboard.



**UNIVERSITY OF
SOUTH CAROLINA**

University of South Carolina

INVOICE NO. CGA0054577

May 15, 2020

USDE - Drawdown
USDE - Drawdown
400 Maryland Ave, SW
Washington DC 20002
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: H025D160021
PRINCIPAL INVESTIGATOR: Palmer, Anthony Jason

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

CATEGORY:	BUDGET AMOUNT	CURRENT AMOUNT	CUMULATIVE AMOUNT
1 SALARIES	64,018.00	2,876.60	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: 10008622
DEPT ID: 152400
BILLER: Kimberly Weip

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	64,018.00	2,876.60	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

It is important to note that the current month activity should match the current amount on the invoice.

V. Search Criteria – Data Fields

As you can see, there are many date field options available on the Search Criteria section of the screen.

The following Fiscal date fields are mostly used by Business Managers/Budget Officers, and PIs/Grant Administrators:

- **Contract:** Search by Contract for grants with multiple projects.
- **Project:** Search by a specific project
- **Fiscal Period:** GL 1920 (fiscal year) 012-June (fiscal year month)
- **Display Account Chartfield:** Select to drill down into the Categories to see related accounts

Note: It is recommended that you select an actual period or month vs. “current open” because you may experience trouble pulling contract data or other important information if left on the default period.

The screenshot shows the 'GRANT DASHBOARD' interface of the University of South Carolina. The header includes the university logo, 'HUB', 'Finance Intranet', and 'Sign out'. The search criteria section contains the following fields and controls:

- Department:** Text input field.
- Fund:** Text input field.
- Contract:** Text input field.
- Project:** Text input field.
- PI:** Text input field.
- Sponsor:** Text input field.
- Class:** Text input field.
- Fiscal Period:** Dropdown menu with 'GL Current [OPEN]' selected.
- Display Account Chartfield:** A checkbox that is currently unchecked.
- Buttons:** 'Submit', 'Clear', and 'CSV' buttons are located at the bottom center.

VI. Returned Data

A. Project Information

The reporting tool organizes the data in the following way.

10008822 ¹				01/01/2019-12/31/2020 [24 months] ⁴
Project FUSION: Preparing Special Education Leader		USCSP - Grant Project ²	CON0004269 ³	
SPN0000853 ⁵	US Department of Education	84.325 Special Education - Personnel Development to Improve Services and Results for Children with Disabilities		H325D180021
PROJECT TEAM ⁶				
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	

	Returned Data Column	Returned Data Defined
1	Project Number and Name	The project ID and project name
2	Type of Project	Identifies whether it is a sponsored project (USCSP) or an internal project (USCIP)
3	Related Contract	The contract ID, if the project is part of a larger account
4	Project End Date	The project start and end date
5	Sponsor # and Name	Sponsor ID and Name
6	Project Team	Includes the Project team role, team names and USCID

B. Project Budget Information

GL 1920 010-April as of 08/06/2020 02:19 [15 months]									
Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	84,018.00	2,878.60	48,790.77	17,227.23		17,227.23	35,511.00	28,039.13	7,471.87
FRINGE BENEFITS	20,728.00	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	3,878.01	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
BURN RATE	(dollars)	20,833.33	12,717.71	COST SHARE RATIO			11.06%	26.27%	
	(%)	4.17%	61.05%						
- Burn rate in dollars = the average monthly budget vs. actual expenses to determine if the spending on the award is above or below the average. - Burn rate budget percentage = the average monthly expenditures as a percent of the total budget. - Actual burn rate percentage = the actual average monthly expenses divided by the average monthly budget expenses to show if the spending on the award is above or below the average rate. An actual burn rate of below 100% would show spending slower than average, whereas a burn rate of above 100% would show spending faster than average.									

Returned Data Column	Returned Data Defined
Fiscal Period	Fiscal Year, fiscal month, and current date
Category	Expense categories, can be expanded to show detailed account codes
Budget	Awarded project budget
Current Month Activity	Expense activity for the selected fiscal period
Life to Date Expenses	Current month activity subtracted from the budget
Balance	Balance should equal the Budget minus the Life to Date Expenses
Encumbrances	Encumbered expenses will be deducted from the available balance
Available Balance	Amount left to spend going forward
Cost Share Budget	Portion of project costs not provided by the sponsor
Cost Share Actual	Portion of the project costs spent to date
Balance	Amount of Cost Share monies left to spend
Burn Rate	Use to see the rate at which a budget is being spent. Explanations for calculating burn rates are provided. For this example, a 24-month period is used to calculate the burn rates.

The definitions are provided, as shown above, from left to right.

VII. Display Account Details

Select **Display Account Chartfield** to drill down into the Categories to see related accounts.



UNIVERSITY OF SOUTH CAROLINA

HUB ▾

Finance Intranet ▾

GRANT DASHBOARD

Sign out

Department

Project

10008822

Class

Fund

PI

Fiscal Period

GL 1920 010-April ▾

Contract

Sponsor

☒ Display Account Chartfield

Submit

Clear

CSV

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	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
51300 FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,000.29	2,593.71
FRINGE BENEFITS	20,726.00	997.41	15,181.51	5,544.49		5,544.49	12,074.00	9,000.29	2,593.71
52000 CONTRACTUAL SERVICES	4,400.00			4,400.00		4,400.00	3,600.00		3,600.00
52051 PRINTING-UNSC 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	16,556.00		1,255.56	15,340.44		15,340.44			
TRAVEL	16,556.00		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/FEES-PARTICIPANTS NON-									
54525 GRADUATE ASSISTANT TUITION SUP	62,838.00		45,427.46	37,410.54		37,410.54			
54530 STIPEND/FELLOWSHIP-SHON REPOR	300,000.00			300,000.00		300,000.00			
FIXED CHARGES	362,838.00		45,427.46	337,410.54		337,410.54			
54550 SCHOLARSHIP-SHON NON REPORTABLE			75,000.00	(75,000.00)		(75,000.00)			
SCHOLARSHIP-SHON 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	14,005.58
53500 INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,996.89)
INDIRECT COST RECOVERY	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,996.89)
INDIRECT EXPENSE	8,678.00	310.07	5,202.80	3,475.20		3,475.20	4,095.00	12,991.89	(8,996.89)
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

Note: The account codes populate above the corresponding category.

VIII. Drilling Down into the Details

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

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, 'TPU') 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)		

On the **GL Activity** page, click into the **Expense Report ID**.

GL Activity							
FP <= 010 AND REGEXP_LIKE(JOURNAL_STATUS, 'TPU') 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
- TOTAL					(327.82)		

Favorites

▼

Main Menu

▼

UNIVERSITY OF SOUTH CAROLINA

All Search

Advanced Search

Add To

Worklist

Home

SC_GM_DASHBOARD_EXPENSE_DTL- Grants Dashboard Expense Dtl

Download results in: Excel Spreadsheet CSV Text File XML File (5 kb)

View All

First 1-4 of 4 Last

Row	Expense Report	Report Description	Employee ID	Name	Expense Date	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	Created On	Travel Auth ID	Advance ID	Amount Applied	Distribution Status	Location	Acctg Date	Budget Header Status	Budget Line Status	Exception Type
1	3000042683	August 2019 Statement	H07800489	Jenkins, Leslie M.	09/29/2019	1	OTHER SUPPLIES		0.00	AMZN Mktg 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.	09/29/2019	2	OTHER SUPPLIES		0.00	AMZN Mktg 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.	09/21/2019	3	DATA PROCESSING SUPPLIES		0.00	AMZN Mktg 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.	09/23/2019	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		

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 REEXP_LIKE(JOURNAL_STATUS, '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)		

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Unit USC01 Journal ID 0000089986 Date 11/25/2019

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

Currency Defaults: USD / CRRNT / 1

Attachments (1)

Reversal: Do Not Generate Reversal

Entered By JOHNSTTT

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

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

☐ Auto Generate Lines
☐ Save Journal Incomplete Status
☐ Autobalance on 0 Amount Line

☐ CTA

Commitment Control

Tiffany Johnston

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IX. How to use the Burn Rates

Burn Rates can be used to see the rate at which a budget is being spent.

They can help:

- Develop a spending strategy with your PI at the beginning of an award.
- Track spending on a periodic basis against budget and adjust as appropriate.

Note: Burn Rates can be helpful but sometimes purchasing large pieces of equipment may cause a spending spike, skewing the rates.

The explanations at the bottom of the screen will help you better understand how each rate is calculated.

BURN RATE	(dollars)	20,833.33	12,717.71	COST SHARE RATIO	11.06%	26.27%
	(%)	4.17%	61.05%			
• Burn rate in dollars = the average monthly budget vs. actual expenses to determine if the spending on the award is above or below the average. • Burn rate budget percentage = the average monthly expenditures as a percent of the total budget. • Actual burn rate percentage = the actual average monthly expenses divided by the average monthly budget expenses to show if the spending on the award is above or below the average rate. An actual burn rate of below 100% would show spending slower than average, whereas a burn rate of above 100% would show spending faster than average.						

X. Inactive Projects

Inactive projects are easily identified in the Grant Dashboard as they are highlighted in yellow seen in the screenshot below.

10007504							*INACTIVE*			
TC3 2C24: Closed -Loop Control of AFP Heating				USCSP - 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			S86921387	01/01/2017 - 06/30/2018			
CGA_OLD			Belk,Lasonya Konnichi Q			G13957034	01/01/2017 - 06/30/2018			
CPI			GURDAL,ZAFER			V37416865	01/01/2017 - 06/30/2018			
CPI			Van Tooren,Michael Johannes L			H97879719	01/01/2017 - 06/30/2018			
PI			HARIK,RAMY			U65156516	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		15,253.66	(1,142.66)		(1,142.66)	16,483.00	22,566.15	(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	1,021.16	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	8,675.00		8,875.00
DIRECT EXPENSE		20,237.00		18,549.53	1,687.47		1,687.47	32,456.00	32,459.00	(3.00)
INDIRECT COST RECOVERY		6,562.00		8,249.47	(1,687.47)		(1,687.47)	8,545.00	14,187.47	(5,642.47)
INDIRECT EXPENSE		6,562.00		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	46,646.47	(5,645.47)
BURN RATE	(dollars)	1,488.83		1,488.83	COST SHARE RATIO			152.99%	174.06%	
	(%)	5.56%		100.00%						