

COLLEGE OF EDUCATION FINANCIAL REPORTING IMPROVEMENT PROJECT

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College of Education

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UNIVERSITY OF
South Carolina

PURPOSE

- This project seeks to bridge the gaps between fiscal transparency **theory** and **practice**, by providing a **single, trustworthy view** of financial data that improves decision making, reduces reporting burden, and strengthens financial transparency.



CURRENT-STATE PROBLEMS

- **Fragmented** financial data
 - PeopleSoft Finance, PeopleSoft HCM, Finance Intranet
 - Finance Intranet serves as the main reporting software but is hard to use meaningfully.
- **Manual, time-intensive** reporting
 - Users have to make pivot tables from Finance Intranet or HCM to create meaningful charts for reporting.
- **Weak link between reporting and strategy**
 - Due to inaccessibility of presented information, Finance Intranet is underused in strategic decision-making.



INTENDED OUTCOMES

- **Increased transparency** and clarity in how the College of Education uses state funding and other financial resources.
- **Clear, meaningful reporting** that links the College of Education's financial spending directly to its strategic priorities.
- **Reduced time and effort** for College of Education staff and leaders to gather, reconcile, and interpret financial data - with an approach adaptable to other colleges if successful.



PEOPLE INVOLVED

- *Sponsor*
 - Brytnee Reichert
- *Team Members*
 - Gerald Byrne
 - Tiffany Johnson
- *Subject Matter Experts*
 - USC Budget Managers
 - USC Controller's Office
 - PeopleSoft Finance and Finance Intranet Teams
 - Dashboard End Users



PROJECT PATH

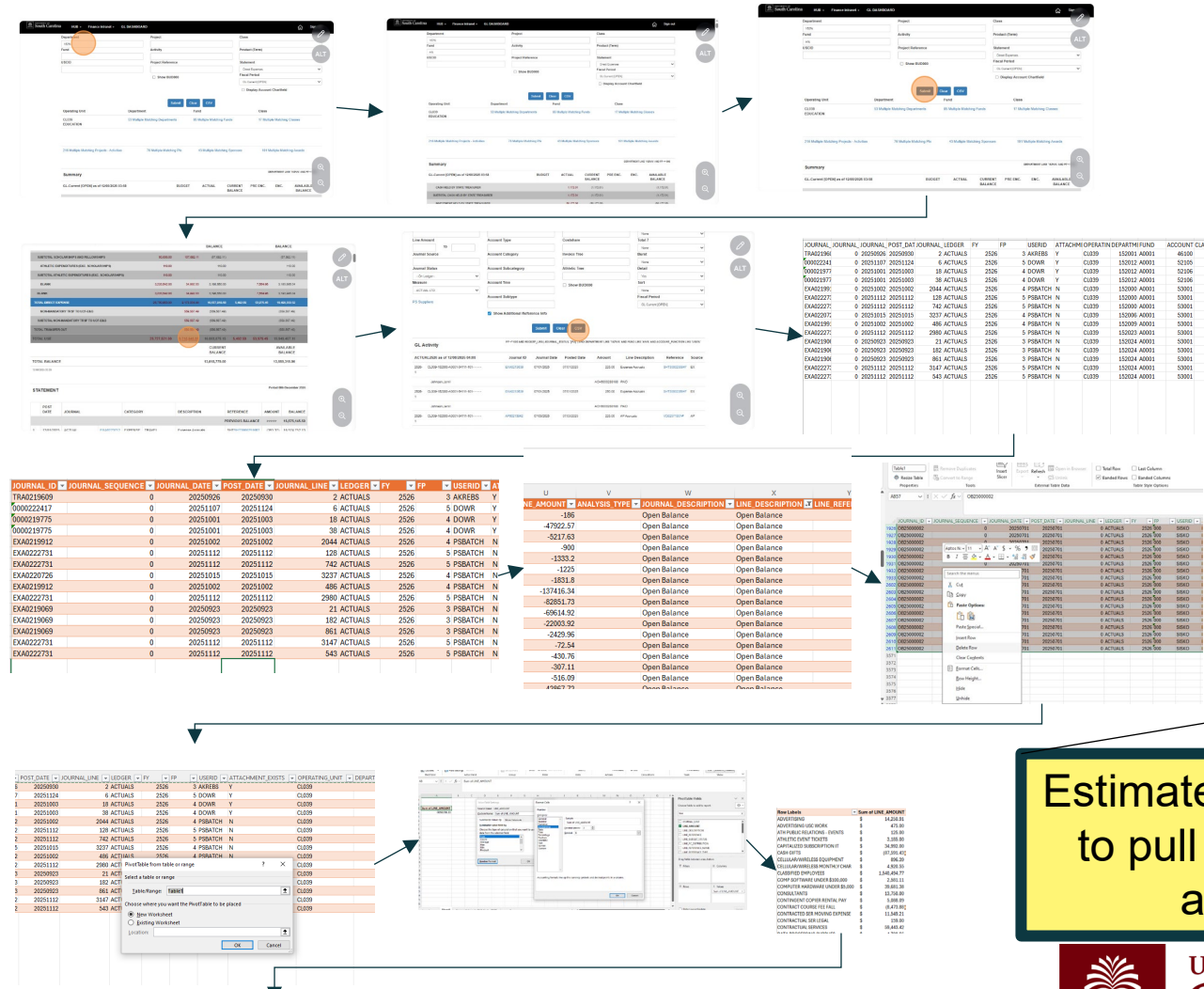
- Discovery
- Possibility
- Planning
- Execution



DISCOVERY: TANGIBLE INPUTS

PII	Classification Code	Hours for Work Week	PD % Reporting	Value Weekly (Hrs)	Value Yearly (Hrs)
Employee 1	AH	37.5	25%	9.375	487.5
Employee 2	UD	37.5	5%	1.875	97.5
Employee 3	AH	37.5	30%	11.25	585
Employee 4	UD	37.5	60%	22.5	1170
Employee 5	BE	37.5	55%	20.625	1072.5
Employee 6	AH	37.5	40%	15	780
Employee 7	AH	37.5	70%	26.25	1365
Employee 8	AH	37.5	15%	5.625	292.5
Employee 9	AH	37.5	35%	13.125	682.5
Employee 10	BE	37.5	35%	13.125	682.5
Employee 11	BE	37.5	35%	13.125	682.5
Employee 12	BE	37.5	35%	13.125	682.5
Employee 13	AH	37.5	45%	16.875	877.5
Employee 14	AH	37.5	10%	3.75	195
Employee 15	AH	37.5	28%	10.3125	536.25
Employee 16	AH	37.5	28%	10.3125	536.25
Employee 17	AH	37.5	28%	10.3125	536.25
Employee 18	AH	37.5	28%	10.3125	536.25
Employee 19	AH	37.5	28%	10.3125	536.25
Employee 20	AH	37.5	28%	10.3125	536.25
			33%	247.5	12,870

Estimated 247.5 hours weekly and 12,870 hours annually in financial expense reporting.



1. Open Finance Intranet
2. Enter Department Field "152%"
3. Enter the Fund "A%"
4. Click Submit
5. Click Total Use
6. Download CSV
7. Open CSV and do not convert
8. Turn into table
9. Open Finance Intranet
10. Enter Department Field "152%"
11. Enter the Fund "E%"
12. Click Submit
13. Click Total Use
14. Download CSV
15. Open CSV and do not convert
16. Turn into table
17. Open Finance Intranet
18. Enter Department Field "152%"
19. Enter the Fund "N%"
20. Click Submit
21. Click Total Use
22. Download CSV
23. Open CSV and do not convert
24. Turn into table
25. Add all tables into one excel file
26. Filter by Open Balances
27. Remove all open balances
28. Unfilter
29. Turn into pivot table
30. Put line amount as the value
31. Reformat as a dollar value instead of as a number value
32. Include items such as "account name" as rows
33. Include toggle filters such as year, department, fund type.

Estimated 33 step process to pull a report for A, E, and N funds.



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DEPARTMENT_NAME (Multiple Items)

DISCOVERY : QUALITY OF OUTPUT

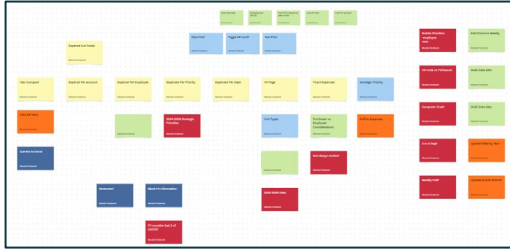
- Current Process
 - Multiple spreadsheets must be combined
 - Data fragmented across systems
 - Complex reporting limits visibility and increases error risk

DEPARTMENT_NAME	(MultipleItems)
Row Labels	Sum of LINE_AMOUNT
ADVERTISING	\$ 9,975.00
ADVERTISING USC WORK	\$ 475.00
CELLULAR/WIRELESS EQUIPMENT	\$ 896.39
CELLULAR/WIRELESS MONTHLY CHAR	\$ 5,018.16
CLASSIFIED EMPLOYEES	\$ 1,366,566.81
COMP SOFTWARE UNDER \$100,000	\$ 2,431.11
COMPUTER HARDWARE UNDER \$5,000	\$ 39,681.38
CONSULTANTS	\$ 13,750.00
CONTINGENT COPIER RENTAL PAY	\$ 4,535.89
CONTRACT COURSE FEE FALL	\$ (8,473.88)
CONTRACTED SER MOVING EXPENSE	\$ 11,549.21
CONTRACTUAL SER LEGAL	\$ 159.00
CONTRACTUAL SERVICES	\$ 41,077.92
DATA PROCESSING SUPPLIES	\$ 4,728.56
EDUCATIONAL SUPPLIES	\$ 697.00
EQUIP AND FIXTURES UNDER \$5K	\$ 10,028.59
ERC EQUIP INSURANCE PREMIUM	\$ 4.63
FEDERAL WORK STUDY STUDENTS	\$ 753.50
FOOD SUPPLIES	\$ 6,113.77
FRINGE BENEFITS	\$ 2,330,328.46
FRINGE BENEFITS HOURLY SALARY	\$ 114,813.70
FURNITURE UNDER \$5,000	\$ 8,926.31
GENERAL REVENUE	\$ (12,500.00)
GRADUATE ASSISTANT TUITION SUP	\$ 84,303.59
HONORARIUM AND GUEST LECTURER	\$ 4,350.00
INSURANCE	\$ 1,373.12
INT CHG USC WORK CONTRACT SER	\$ (10,210.00)
INT CHRG CONTRACTUAL SERVICE	\$ (1,746.88)
LIBRARY BOOKS AND PERIODICALS	\$ 421.05
LICENSES AND FEES	\$ 4,120.00
MEMBERSHIP FEES	\$ 12,840.00
MODEL - PARTICIPATION FEE	\$ 6,438,844.00
MODEL ACADEMIC AFFAIRS ALLOC	\$ 2,506,080.00
MODEL APPROPRIATIONS INSTRUCT	\$ (7,999,224.00)
MODEL APPROPRIATIONS RESEARCH	\$ (7,251,790.00)
MODEL EMPLOYEE SERV ALLOC	\$ 1,836,727.00
MODEL EXECUTIVE AFFAIRS ALLOC	\$ 2,715,571.00
MODEL FACILITIES ALLOC	\$ 2,132,049.00
MODEL GRADUATE	\$ (8,062,270.00)
MODEL RESEARCH ALLOC	\$ 1,192,945.00
MODEL SIF NON-RECURRING	\$ (153,167.00)
MODEL SIF RECURRING	\$ (966,254.00)
MODEL STUD SERV UG AFF ALLOC	\$ 1,431,230.00
MODEL SUBVENTION	\$ (8,735,854.00)
MODEL UNDERGRAD NONRESIDENT	\$ (3,799,704.00)
MODEL UNDERGRAD RESIDENT	\$ (5,638,076.00)
MODEL UNIV SERV OPER ALLOC	\$ 6,728,692.00
NON EMPLOYEE TRAVEL	\$ 989.32
NON FED WORK STUDY STUDENTS	\$ 288,896.28
OFFICE SUPPLIES	\$ 2,354.04
OTHER FIXED CHARGES	\$ 6.44
OTHER SUPPLIES	\$ 6,804.54
POSTAGE	\$ 1,288.42
PRINTING USC WORK	\$ 1,905.18
PRIOR YR SUMMERSCHOOL TUITION	\$ (418,049.88)
REGISTRATION FEES	\$ 490.00
RENTALS	\$ 3,585.50
REPAIRS TO BUILDINGS- USC WORK	\$ 569.40
SALARIES	\$ (339,030.56)
SALARY PAYABLE HOURLY	\$ 339,030.56
SCHOLARSHIPS	\$ 14,207.50
SPONSORSHIP FEES	\$ 1,000.00
STUDENT TRAVEL	\$ 10,183.59
SUBSCRIPTION FEES, NON-LIBRARY	\$ 1,832.66
SUMMER INSTRUCTION	\$ 197,641.23
TELEPHONE & NETWORK SERVICES	\$ 860.20
TEMPORARY EMPLOYEES	\$ 379,156.79
TRANSFERS IN	\$ (11,073.73)
TRANSFERS OUT	\$ 436,076.00
TRAVEL ADVANCE	\$ 1,172.01
TRAVEL REGISTRATION	\$ 14,119.36
UNCLASSIFIED EMPLOYEES	\$ 4,076,022.66
UNIVERSITY TUITION	\$ (453,341.93)
USC EMPLOYEE TRAVEL	\$ 84,470.17
Grand Total	\$ (8,986,441.48)

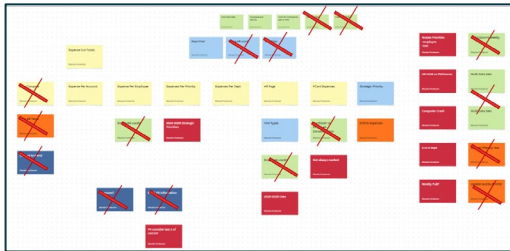
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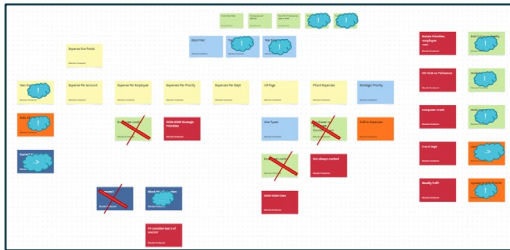
POSSIBILITY: SKETCHING THE IDEAL, THE CURRENTLY POSSIBLE, AND A COMPROMISE



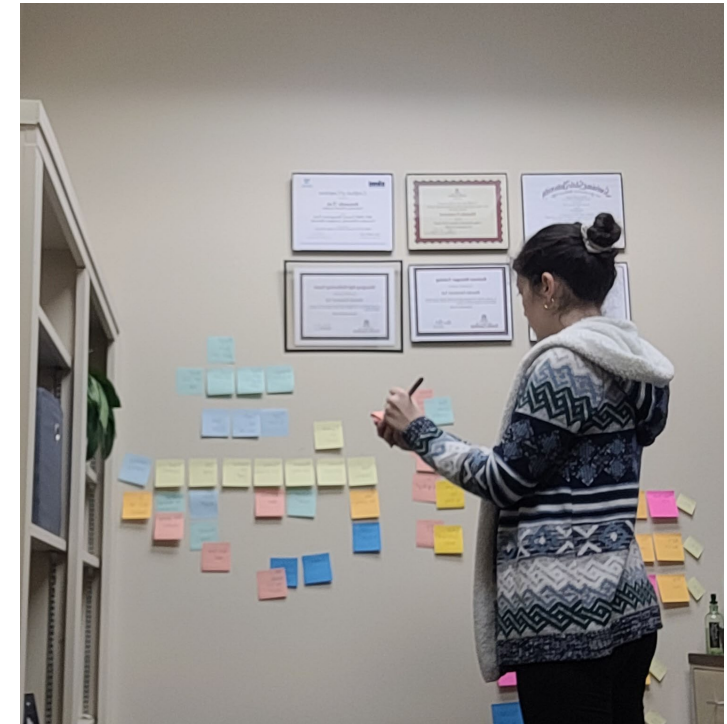
What would be nice in an ideal world?



What can we currently do?

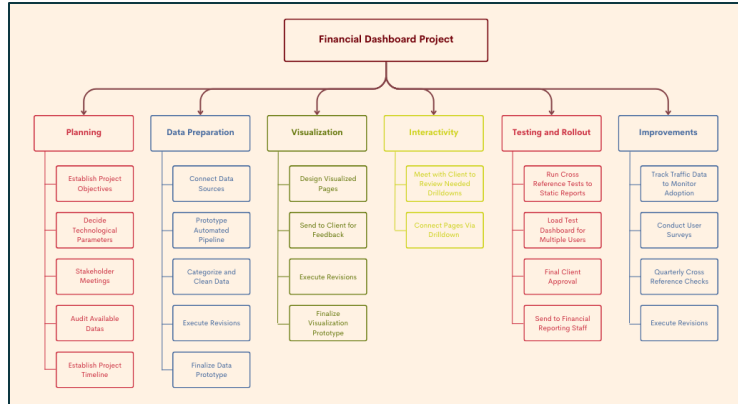


What can we work towards in the future or do in a different way?



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PLANNING



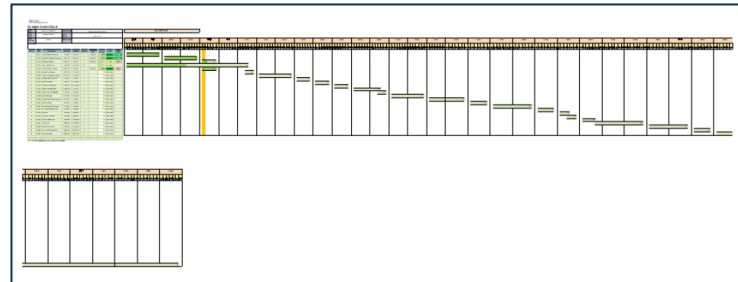
Work Breakdown Structure



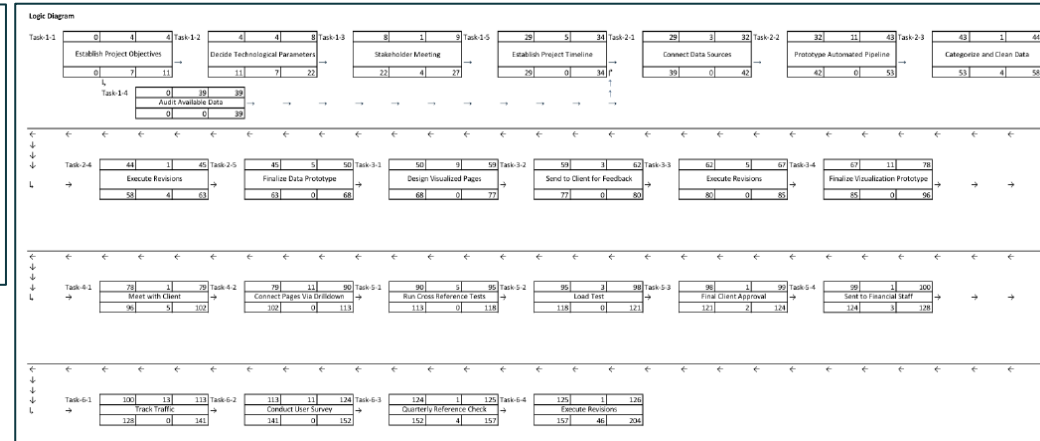
Milestone Mapping

Type	Project Management Risks	Technical Risks	Organizational Risks	External Risks	Data Security Risks
Risk	Scope creep; unrealistic scheduling; ineffective communication; inadequate planning for testing timelines.	Integration issues with PeopleSoft; inaccurate data migration; system scalability; PowerBI instabilities for advanced features.	Internal resistance to new technologies; overlapping reporting structures; delays in adoption from leadership.	Contract changes from Microsoft to Google; institutional policies or funding changes; regulatory compliance changes from the state.	Unauthorized network access; breaches compromising financial information.
Probability	Medium	High	Medium	Low	Low
Impact	Medium	High	Low	High	High
P x I	4	9	2	3	3
Response Strategy	Mitigate	Avoid	Mitigate	Accept	Transfer
Action	Engage critical path timeline until schedule is resumed.	Work closely with internal IT teams to ensure that created project has been adequately tested prior to rollout.	Provide training sessions and simplify dashboard options.	Engage with institutional leadership regarding new contracts.	Involve cyber security teams and take dashboard down until threat is resolved.
Contingency	Critical Path.	Engage in minimal reporting until resolved.	Launch internal promotion.	Engage in manual reporting.	Engage in manual reporting until resolved.
Trigger	Project goes off schedule by greater than a week.	Dashboard access issues beyond 4 hours.	Low adoption rates in traffic monitoring.	Notification of external changes.	Detection of unauthorized access.

Risk Management Plan



Gantt Chart and Critical Path



Probability of Occurrence:

Rating	Description
Low (1)	<45% (unlikely)
Medium (2)	45-70% (equally likely)
High (3)	>70% (likely)

Impact Scale:

Rating	Description
Low (1)	Minor impacts; minimal corrections needed, but project will stay on track.
Medium (2)	Moderate impact; requires noticeable adjustments and re-planning.
High (3)	Significant impact; could cause delays or reductions; puts project completion at risk.

Probability and Impact Matrix:

Risk Score (P x I)	Zone	Response Priority
6-9	Critical	Immediate response and action required.
4-6	High	Frequent monitoring needed and action needed.
2-4	Medium	Monitored regularly and actions considered.
≤2	Low	No response needed.



EXECUTION

COE Expense Dashboard Instructions for Updates

There are 8 Tabs in the spreadsheet "Test Drive Dashboard".

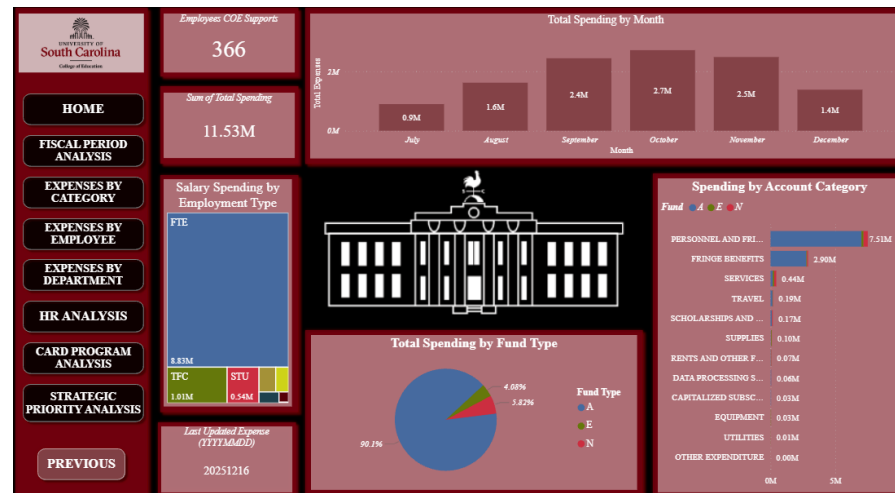
1. Expenses
2. HR FY
3. Employee Tied
4. NON HR
5. CARD
6. Dates
7. USCID
8. Last Updated

To being updating the data, please navigate to Finance Intranet.

To update the Expenses Page:

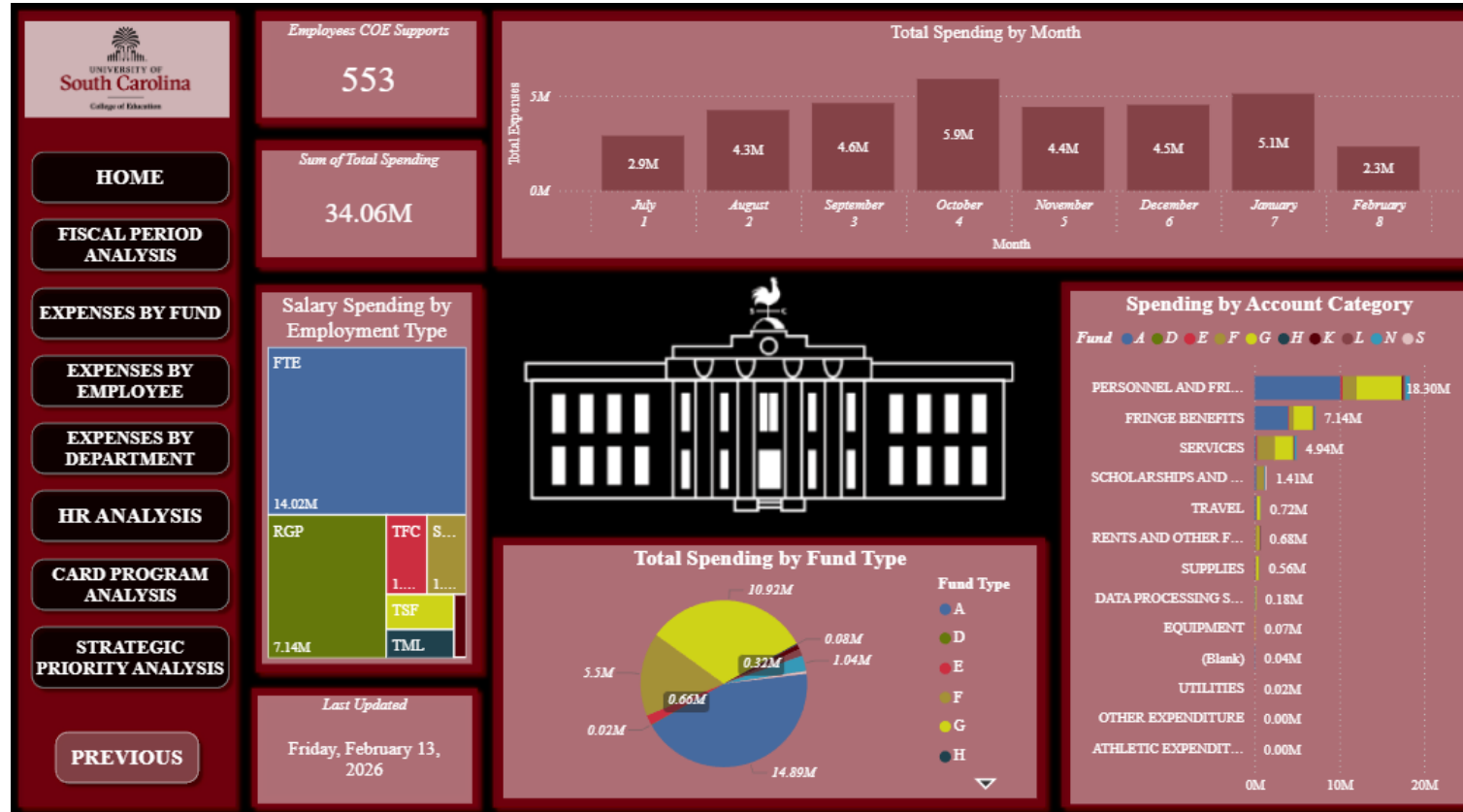
1. Navigate to https://www.admin.sc.edu/FINANCE/GLACTIVITY.php?jestat=pu&strRl=1&output=screen&ledger=ACTUAL&sub1=%27gtot%27&sub2=none&sub3=none&sub4=none&sub5=none&sub6=none&sub7=none&dept=152%25&fund=&uscid=&project=&activity=&projref=&strBUD000=&class=&product=&strStmnt=d&strTable=glday&dispac t=&ledger=ACTUAL_LTD&afunc=USE&account_subtype=DIRECT%20EXPENSE
2. Download the CSV
3. Paste into the Expense Tab.
4. For Column "Relevant Notes", filter by "Open Balances" and delete those rows.
5. Filter by "Select All" to return other values
6. Using "TO COPY MEASURE" and the Filter Tool, ensure the word "FLAG" does not appear in that column.

To update the HR FY Page:



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KEY IMPROVEMENTS



Click for [Demo](#).

Please note, this demo is the snapshot last updated in February.

Due to some of the information residing in systems requiring access, personally identifiable information regarding salaries has been removed.

MEASURABLE RESULTS

- **Process Simplification**

- Reduced from **660+ total steps across 20 people to 27 steps for one person**
- **Eliminated handoffs and duplicated work** across staff
- 73% reduction already achieved in the COE Business Office
- 96% reduction in process steps at full implementation

- **Time Savings**

- Dashboard update time reduced **from 495 hours to 45 minutes every two weeks**
- Nearly all reporting time eliminated at full implementation (99.85%)
- 98% reduction already achieved in the COE Business Office



QUALITATIVE RESULTS

- **Transparency**

- Transparency in public finance as “**ready access** to reliable, comprehensive, timely, **understandable**, and internationally comparable information” (Kopits & Craig, 1998).
- Dashboards with graphs are a legitimate evaluation tool of **organizational performance** and lead to higher **accuracy for complex auditing** tasks (Yigitbasioglu and Velcu, 2012, DeBusk et al., 2003, and Wright, 1995)

- **Decision Making**

- Transparent financial practices are pivotal in times of university fiscal constraint or major organizational or political changes to ensure that key parties believe **resource allocation and institutional priorities are adequately aligned**, fostering credibility and trust that the institution is maintaining **inclusive, data-driven decisions** aimed at meeting institutional strategic goals (Fox, 2007 and Anderson & Minarik, 2006).
- Tabular information led to **better decisions** involving selective tasks and graphs can **reduce the negative influence of information overload** and lead to **more accurate financial predictions** (Yigitbasioglu and Velcu, 2012, Amer, 1991, Diamond and Lerch, 1992, Umanath and Vessey, 1994, and Hard and Vanecek, 1991).



ACTION STEPS

Completed:

- Prototype 1 released to sponsor and project team (12/12/2025)
- Prototype 2 released to key users and College leadership (12/19/2025)
- Feedback-driven improvements completed Jan–Feb 2026
- Prototype 3 released with **expansion** from A, E, and N funds **to all funds** (2/13/2026)

Moving forward:

- Exploring HR access to enable **rollout** to all 20 reporting staff
- Dashboard updated after each pay cycle
- Ongoing feedback to **continuously improve report quality**



REFLECTIONS

- Biggest Learning: **Prepare to Fail**
 - Large scale creation projects will fail. Multiple times.
 - Start the project knowing that parts will not work and will need to be revisited later.
 - This **keeps you planning to shoot for the stars and continue moving forward** because you **remove the fear of failure**.



THANK YOU!

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