OFFICE OF THE CONTROLLER

Grant Administration

Finance Intranet Reports

February 2024

UNIVERSITY OF
South Carolina

Table of Contents

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Introduction to the HUB

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What is the HUB?

- An internal reporting site that houses various reporting tools and resources used to research financial transactions and retrieve account balances.

- The two main sections covered in this class are:
  – Financial Reports (Finance Intranet)
  – Payroll Reports (HCM Distribution)

- Use this URL to access the HUB: www.admin.sc.edu

- You can also access other important sites from this page:
  – Student and Tuition Reports (Banner and DataWarehouse)
  – Analytics (CarolinaAnalytics)
  – PeopleSoft HCM and PeopleSoft Finance
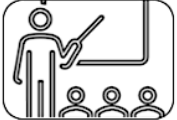 – USCeRA
  – Controller's Office Webpage

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The HUB

Introduction to Financial Reports

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Financial Reports

Financial Reports

- Notice you can also find links to:
  - PeopleSoft Finance
  - USCeRA

What are Financial Reports?

Financial Reports provides access several reporting tools. We will go over the following today:

- **GL Dashboard:** Provides current and available balance using budget to actual comparison and detailed monthly statement of Accounting transactions.

- **GL Summary:** Provides a more advanced reporting view to allow users to filter, group and burst summary data. (not covered in this session)

- **GL Activity:** Provides the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level.

- **GL Yearly Comparison:** Provides a comparison by account for 2 to 5 fiscal years.

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Financial Reports Continued

- **Grant Dashboard:** Designed specifically for sponsored award (USCSP) grant projects. Provides the ability to view expenses and cost share.
  - Summary View
  - Detail View

- **Non-USCSP Project Dashboard:** Provides the ability to easily see cash balances and end dates for internal projects (USCIP), spendable endowments (USCEN), and student activity (USCSA) projects all in one report with drill downs into GL Summary and GL Activity.

- **Fund Dashboard:** Provides a listing of available cash balances and outstanding encumbrances by individual fund (non-A Fund). (not covered in this session)

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Helpful Tip #1

- Drill down capability will require you to log into PeopleSoft Finance to view specific transactions.

- Ensure you are not using PeopleSoft HCM in the same browser as this will prevent your ability to log into PeopleSoft Finance. These systems cannot be viewed simultaneously in the same browser. You will receive the following error message:
  - ✓ *"STR_PCMINVPORTAL: Invalid portal name EMPLOYEE in request. Portal not defined. Unable to process request with an invalid portal."*

- If you need to use both HCM and Finance, we recommend using **different** browsers for each system.

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Helpful Tip #2

- Intranet reports have a CSV button so that the data can be exported to Excel.

- Intranet reports can also be copied and pasted into Excel.

- All Intranet reports have a floating column header so that the column titles can be seen throughout the report.

NOTE: If you want to **print** an Intranet report, make sure that you have scrolled all the way up to the top of the Intranet report before printing.

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Financial Reports: GL Dashboard

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Financial Reports: GL Dashboard

- Select Financial Reports, then GL Dashboard.

GL Dashboard – Search Options

- If unsure where to start, click the available links to select from a list of options.
- Select the **Operating Unit** is a great place to start.

GL Dashboard – Search Criteria

Provides current and available balance using budget actual comparison and detailed monthly statement of transactions.

Search By:

- Department, Fund, or Project

- Select an actual period or month vs. "current open" period

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

GL Dashboard – Review Approvers

Operating Unit	Department	Fund	Class
CL040	155001	A0001	101
ENGINEERING - COMPUTING	**COLL ENGR & COMPTNG OPERATING**	**UNRESTRICTED OPERATING FUND**	**GENERAL ACADEMIC INSTRUCTION**
		1-CURRENT UNRESTRICTED	

DEPARTMENT APPROVERS

Role	Name	USCID	Email
APPRV_1	Kay Dorrell	Q94407338	dorrellk@cec.sc.edu
APPRV_1	Shannon Lackey	Q71600810	svlackey@cec.sc.edu
APPRV_2	Alicia Stoll Williams	A56084650	alstoll@cec.sc.edu

- This example is showing a list of approvers for Department 155001/A0001 (Dept/Fund search).

- When searching by Project, the Project Team information will become available.

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GL Dashboard – Data Review

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE	PRE ENC.	ENC.	AVAILABLE BALANCE
TOTAL REVENUE	(132,910.00)		(132,910.00)			(132,910.00)
81100 TRF FR E&G UCF (ADER)	504,323.00	5,582.00	498,741.00			498,741.00
NON-MANDATORY TRSF FROM UCF-E&G	504,323.00	5,582.00	498,741.00			498,741.00
SUBTOTAL NON-MANDATORY TRSF FROM UCF-E&G	504,323.00	5,582.00	498,741.00			498,741.00
TOTAL TRANSFER IN	504,323.00	5,582.00	498,741.00			498,741.00
TOTAL RESOURCE	27,185,493.00	32,936,342.20	(5,750,849.20)			(5,750,849.20)

The GL Dashboard provides:

- Budgeted Resources vs. Actual Resources
- Categories / Subtotals of Revenues

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GL Dashboard – Data Review

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE	PRE ENC.	ENC.	AVAILABLE BALANCE
TOTAL DIRECT EXPENSE	27,185,493.00	19,037,997.48	8,147,495.52			8,147,495.52
86100 TRF TO E&G UCF (ADER)		5,582.00	(5,582.00)			(5,582.00)
86101 TRF TO DEPT N FUNDS		50,000.00	(50,000.00)			(50,000.00)
NON-MANDATORY TRSF TO UCF-E&G		55,582.00	(55,582.00)			(55,582.00)
SUBTOTAL NON-MANDATORY TRSF TO UCF-E&G		55,582.00	(55,582.00)			(55,582.00)
TOTAL TRANSFER OUT		55,582.00	(55,582.00)			(55,582.00)
TOTAL USE	27,185,493.00	19,093,579.48	8,091,913.52			8,091,913.52

The GL Dashboard provides:

- Budgeted Uses vs. Actual Uses

- Subtotals by expense category

- Ability to see specific accounts in each category

- Drill down capability

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GL Dashboard – Drill Down

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE
FACULTY, DEANS, ACAD. DEPT HEAD		10,751.00	(10,751.00)
51400 NON FED WORK STUDY STUDENTS		2,999.97	(2,999.97)
OTHER		2,999.97	(2,999.97)
SUBTOTAL PERSONNEL AND FRINGE BENEFITS	20,391,535.00	14,082,787.38	6,308,747.62
51900 FRINGE BENEFITS	6,793,958.00	4,940,530.24	1,853,427.76
FRINGE BENEFITS	6,793,958.00	4,940,530.24	1,853,427.76
SUBTOTAL FRINGE BENEFITS	6,793,958.00	4,940,530.24	1,853,427.76
52070 CONTRACTUAL SERVICES		122.15	(122.15)
CONTRACTUAL SERVICES		122.15	(122.15)
SUBTOTAL SERVICES		122.15	(122.15)
53004 DATA PROCESSING SUPPLIES		9,076.21	(9,076.21)
DATA PROCESSING SERVICES		9,076.21	(9,076.21)
SUBTOTAL DATA PROCESSING SUPPLIES AND SERVICES		9,076.21	(9,076.21)
54525 GRADUATE ASSISTANT TUITION SUP		5,481.50	(5,481.50)
SCHOLARSHIPS AND FELLOWSHIPS		5,481.50	(5,481.50)
SUBTOTAL SCHOLARSHIPS AND FELLOWSHIPS		5,481.50	(5,481.50)
TOTAL DIRECT EXPENSE	27,185,493.00	19,037,997.48	8,147,495.52

- You can click the active links to drill down to the activity level.

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GL Dashboard – Drill Down

GL Activity		FP <= 008 AND REGEXP_LIKE(JOURNAL_STATUS, '[PU]') AND DEPARTMENT LIKE '155001%' AND FUND LIKE 'A0001%' AND a.ACCOUNT LIKE '53004%' AND ACCOUNT_FUNCTION LIKE 'USE%' AND ACCOUNT_SUBTYPE LIKE 'DIRECT EXPENSE%' AND ACCOUNT_CATEGORY LIKE 'E125%' AND ACCOUNT_SUBCATEGORY LIKE 'E25%'						
ACTUAL2122 as of 10/21/2022 03:28		**Journal ID**	**Journal Date**	**Posted Date**	**Amount**	**Line Description**	**Reference**	**Source**
2122-6	CL040-155001-A0001-53004-101- - - - -	EXA0132217	12/03/2021	12/03/2021	533.48	Expense Accruals	SHT3000097339	EX
	Dohan,David Carl		Dohan,David Carl		PCARD24430991314083355026219-23096411111			
2122-7	CL040-155001-A0001-53004-101- - - - -10009287	AP00134287	01/04/2022	01/18/2022	43.36	AP Accruals	VO02063999⬮	AP
	DELL MARKETING LP	PO2000060846			CHK5000673388	PAID AND CLEARED		
2122-7	CL040-155001-A0001-53004-101- - - - -10009287	AP00134287	01/04/2022	01/18/2022	54.12	AP Accruals	VO02063999⬮	AP
	DELL MARKETING LP	PO2000060846			CHK5000673388	PAID AND CLEARED		
2122-7	CL040-155001-A0001-53004-101- - - - -10009287	AP00134797	01/25/2022	01/27/2022	8,445.25	AP Accruals	VO02075411⬮	AP
	DELL MARKETING LP	PO2000060846			CHK5000675251	PAID AND CLEARED		
- TOTAL					(9,076.21)			

- Use the active links to drill down into the activity to see the specific expenses, payroll, and voucher data for that account.

- Notice how the $9,076.21 drill down total matches the summarized total for account 53004 on the previous slide.

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GL Dashboard – Drill Down

Expense Report Example:

ACTUAL2122 as of 10/21/2022 03:28	Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2122-6 CL040-155001-A0001-53004-101- - - - -	EXA0132217	12/03/2021	12/03/2021	533.48	Expense Accruals	SHT3000097339	EX

Favorites ▼   Main Menu ▼

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All ▼ Search » Advanced Search

SC_GM_DASHBOARD_EXPENSE_DTL- Grants Dashboard Expense Dtl

Download results in : Excel SpreadSheet   CSV Text File   XML File   (7 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
1	3000097339	November 2021	N38462378	Dohan,David Carl	11/17/2021	1	1	OTHER SUPPLIES		0.00	ADVANCED VIDEO GROUP	DS - Directory TV	USC01	CL040	155030	A0001	53009	456					1097.280	12/02/2021
2	3000097339	November 2021	N38462378	Dohan,David Carl	10/30/2021	2	1	DATA PROCESSING SUPPLIES		0.00	DMI* DELL K-12/GOVT	SS-Laptops	USC01	CL040	155024	A0001	53004	456					1672.260	12/02/2021
3	3000097339	November 2021	N38462378	Dohan,David Carl	11/10/2021	3	1	DATA PROCESSING SUPPLIES		0.00	DMI* DELL K-12/GOVT	Sumwalt - Lab Printing supplies	USC01	CL040	155001	A0001	53004	101					533.480	12/02/2021
4	3000097339	November 2021	N38462378	Dohan,David Carl	10/27/2021	4	1	DATA PROCESSING SUPPLIES		0.00	NEWEGG INC	DS-Printer Toner	USC01	CL040	155030	A0001	53004	456					124.170	12/02/2021
5	3000097339	November 2021	N38462378	Dohan,David Carl	11/11/2021	5	1	DATA PROCESSING SUPPLIES		0.00	NEWEGG INC	COM-Camera Equipment	USC01	CL040	155027	A0001	53004	101					37.780	12/02/2021

- Click the **Reference** to view the expense detail in Finance PeopleSoft.

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GL Dashboard – Drill Down

Voucher Example:

2122-7	CL040-155001-A0001-53004-101- - - - -10009287	AP00134287	01/04/2022	01/18/2022	43.36	AP Accruals	VO02063999 📎	AP
	DELL MARKETING LP	PO2000060846			CHK5000673388	PAID AND CLEARED		
2122-7	CL040-155001-A0001-53004-101- - - - -10009287	AP00134287	01/04/2022	01/18/2022	54.12	AP Accruals	VO02063999 📎	AP

Voucher Line Details

Voucher Details

Business Unit	USC01		Gross Amount	90.26
Voucher ID	02063999			
Invoice No	10548021031		Misc Charges	7.22
Invoice Dt	12/28/2021			
Supplier ID	C000001515		Total VAT	0.00	Attachments (1)
Name	DELL MARKETING LP		Transaction Currency	USD	Comments(0)

- Click the specific expense you would like to view transaction details for within the system. A **paperclip** indicates there is an attachment.

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GL Dashboard – Drill Down

Voucher Example:

- Click the **Attachments** link to view supporting documentation.

GL Dashboard – Drill Down

Payroll Example:

GL 2122 008-February as of 10/21/2022 03:28	BUDGET	ACTUAL	CURRENT BALANCE
51000 SALARIES	704,651.00	(25,644.39)	730,295.39
51200 CLASSIFIED EMPLOYEES	4,552,493.00	2,402,484.03	2,150,008.97

ACTUAL2122 as of 10/21/2022 03:28		Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0123964 📎	07/10/2021	07/13/2021	146,539.90	HR Payroll Journals	>>HCM	PAY
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0123964 📎	07/10/2021	07/13/2021	4,450.64	HR Payroll Journals	>>HCM	PAY
2122-1	CL040-155001-A0001-51200-101- - - - -	REV0124260 📎	07/01/2021	07/16/2021	(92.04)	FY21 accrue hrly		ONL
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0125017 📎	07/29/2021	07/30/2021	191.75	HR Payroll Journals	>>HCM	PAY
2122-1	CL040-155001-A0001-51200-101- - - - -	PAY0125017 📎	07/29/2021	07/30/2021	155,921.17	HR Payroll Journals	>>HCM	PAY
2122-2	CL040-155001-A0001-51200-101- - - - -	PAY0125851 📎	08/11/2021	08/13/2021	4,527.34	HR Payroll Journals	>>HCM	PAY

NAME	USCID	FISCAL PERIOD : JOURNAL	JOB	HCM DEPT	GROUP	PAY PERIOD	CHECK	CHK DATE	COMBO	CHARTFIELD	LBR $	LBR %
Ammarell,Karen D.	A99764394	2122-1 : PAY0123964	AH10	155201	C12	07/15/2021	8000709347	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,865.42	100.00%
Austin,Ryan Mendes	P13756325	2122-1 : PAY0123964	AM68	155020	C12	07/15/2021	8000709285	07/15/2021	A00000001702	CL040-155001-A0001-101--	3,536.13	100.00%
Bailey,Sheryl W.	A90261674	2122-1 : PAY0123964	AH10	155201	C12	07/15/2021	8000709348	07/15/2021	A00000001702	CL040-155001-A0001-101--	2,248.88	100.00%
Baldwin,Randi Katherine	J45296042	2122-1 : PAY0123964	AH10	155901	C12	07/15/2021	8000709382	07/15/2021	A00000001702	CL040-155001-A0001-101--	2,229.71	100.00%
Balestrero,Jenny R	H14485179	2122-1 : PAY0123964	AH10	155301	C12	07/15/2021	8000709352	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,716.54	100.00%
Bedenbaugh,Janice Kay	F51627195	2122-1 : PAY0123964	AH10	155602	C12	07/15/2021	8000709377	07/15/2021	A00000001702	CL040-155001-A0001-101--	2,087.71	100.00%
Bradshaw,Kimberly Lee	T49620394	2122-1 : PAY0123964	AH10	155020	P12	07/15/2021	8000715574	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,622.92	100.00%
Cantrell,Christopher Blake	Q80153272	2122-1 : PAY0123964	AD20	155020	C12	07/15/2021	8000709286	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,766.88	100.00%
Deschamps,Kachet A	F03097771	2122-1 : PAY0123964	AH10	155020	C12	07/15/2021	8000709287	07/15/2021	A00000001702	CL040-155001-A0001-101--	1,851.35	100.00%

- Click the specific expense you would like to view transaction details for within the system. A **paperclip** indicates there is an attachment.

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Inactive Project

- Inactive projects will return as yellow.

Demonstration

- Using the GL Dashboard
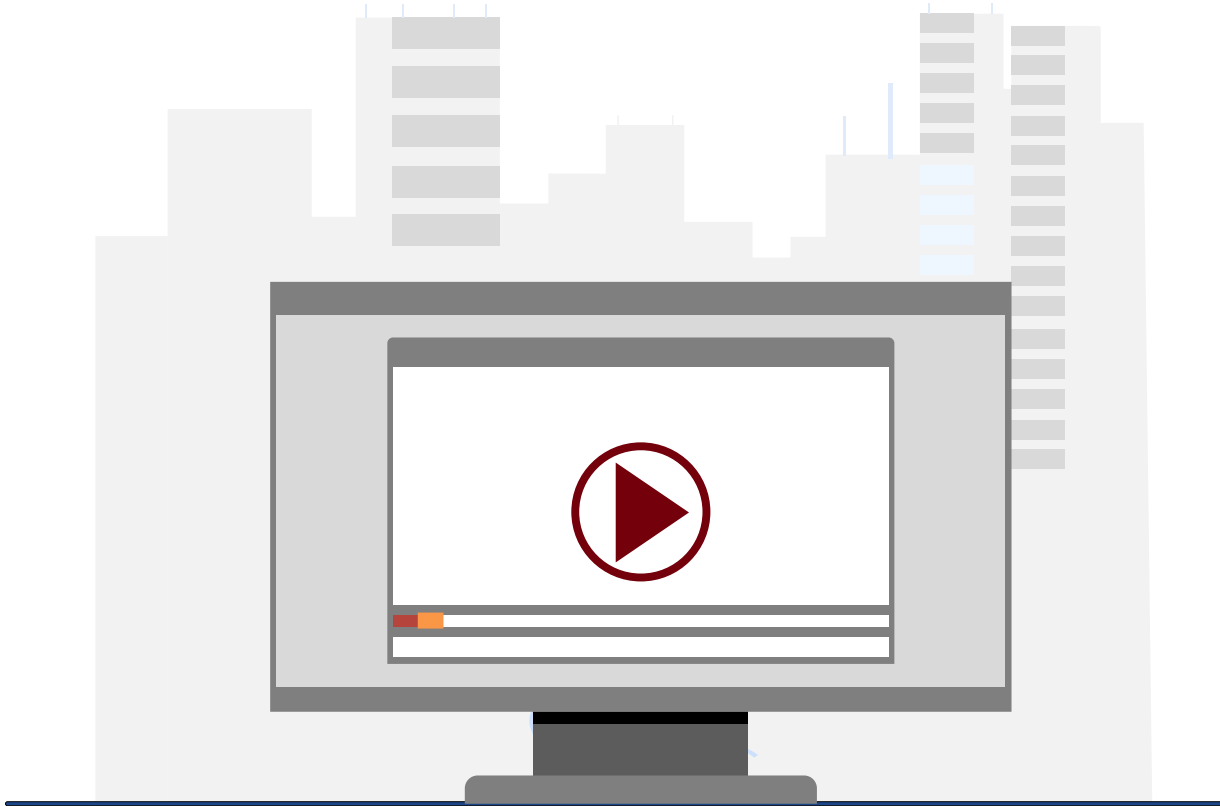
GL Dashboard Key Take-Aways

- Detailed report with built-in subtotals and also transaction activity at the bottom.

- **Fiscal Period** always defaults to current period.

- Use the **Display Account Chartfield** checkbox to view account information.

- Remember, you can drill down into any of the expenses including payroll and budget transactions!

- Recommended to use the Grant Dashboard when reviewing sponsored award projects (USCSP).

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Financial Reports: GL Yearly Comparison

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Finance Reports - GL Yearly Comparison

- Select Financial Reports, then GL Yearly Comparison.

GL Yearly Comparison – Search Criteria

Provides a year over year comparison of fiscal year data in the GL Summary format.

Report Criteria:
- Search by Operating Unit, Fund, Account, Project or Sponsor.
- Output 2, 3, 4, or 5-year comparison.
- Select a Fiscal Period.

GL Yearly Comparison – Data Review

Search By:

- Operating Unit/Fund/Account

- In this example, CL037, A0001, 5% accounts.

GL Yearly Comparison – Data Review

GL FY 2122 as of 10/21/2022 03:28	ACTUAL_YTD 1718	ACTUAL_YTD 1819	ACTUAL_YTD 1920	ACTUAL_YTD 2021	ACTUAL_YTD 2122	BALANCE CHANGE	PERCENT CHANGE
54200-OTHER FIXED CHARGES	28,697.65	36,046.63	30,276.71		18,394.12	(10,303.53)	(0.4)%
54230-OTHER FIXED CHG CREDIT CARD CH	5,341.83	5,639.96	3,407.18	1,217.10	7,240.43	1,898.60	0.4%
54520-TUITION/FEES-PARTICIPANTS NON-							
54525-GRADUATE ASSISTANT TUITION SUP	164,396.00	196,421.00	172,783.00	169,802.00	212,430.50	48,034.50	0.3%
54533-INCENTIVE UNDER 50.00		690.85	(346.09)	2,248.73	5,069.10	5,069.10	
54534-INCENTIVE OVER 50.00	258.00	1,449.00	4,228.00	780.00	150.00	(108.00)	(0.4)%
54550-SCHOLARSHIPS NON REPORTABLE	500.00	500.00	1,875.00	5,500.00	2,000.00	1,500.00	3.0%
56007-DATA PROCESSING EQUIPMENT							
56203-TECHNOLOGY & EQUIPMENT		138,002.28		47,672.51			
57020-BUILDING PURCHASE							
TOTAL 5-EXPENSE	13,166,882.60	13,975,084.46	16,341,266.59	14,732,857.53	16,497,190.61	3,330,308.01	0.3%

This example is a 5-year comparison of A Fund expenses for an entire operating unit. The fiscal period chosen was FY22, so each column above represents an entire fiscal year. If October 2022 was chosen the results would have shown each fiscal year to date through October of each year.

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GL Yearly Comparison – Data Review

Search By:

- Operating Unit/Department/Account/ Sponsor

Note: Fiscal Period was kept at GL Current (Open), so the comparison looks at each fiscal year to date (i.e. June-October for each year).

GL Yearly Comparison – Data Review

GL-Current [OPEN] as of 10/14/2022 03:45	ACTUAL 1819	ACTUAL 1920	ACTUAL 2021	ACTUAL 2122	ACTUAL 2223	BALANCE CHANGE	PERCENT CHANGE
4-REVENUE							
41110-PRINTING SHOP 41110-PRINTING SHOP							
43000-RECOVERY OF INDIRECT COST 43000-RECOVERY OF INDIRECT COST							
48610-FEDERAL NON GRANT REVENUE 48610-FEDERAL NON GRANT REVENUE							
48617-C&G BILLED REVENUE 48617-C&G BILLED REVENUE	1,957,236.03	2,964,807.28	3,895,724.11	4,091,138.54	5,980,558.07	(4,023,322.04)	(2.1)%
48618-C&G UNIDENTIFIED REVENUE 48618-C&G UNIDENTIFIED REVENUE							
48650-GENERAL REVENUE 48650-GENERAL REVENUE		(279.20)					
TOTAL 4-REVENUE	1,957,236.03	2,964,528.08	3,895,724.11	4,091,138.54	5,980,558.07	(4,023,322.04)	(2.1)%

This example shows a 5-year revenue comparison by Sponsor, National Institutes of Health (NIH), for a specific department for the fiscal year-to-date.

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Demonstration

- Using the GL Yearly Comparison

GL Yearly Comparison Key Take-Aways

- Understanding the **Fiscal Period** is very important to achieving correct report results.

- Versatile tool for easily comparing date over time and viewing trends without having to run multiple reports.

- Additional filters allow for more analytical options.

- Use the wildcard (%) to pull in additional search values.

- You can drill down into any of the expenses including payroll.

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Financial Reports: Grant Dashboard

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Financial Reports: Grant Dashboard

- Select Financial Reports, then Grant Dashboard.

Grant Dashboard

- Provides Principal Investigators the ability to access expense data for USC sponsored projects (USCSP).

- Expenses will be grouped in the similar categories as shown on the Standard USC Invoice submitted to sponsors.

- Gives the ability to expand categories to show detail account codes.

- Provides budget and actual expenses for direct costs and cost share.

- Enables you to track cost share and ensure you are spending within ratio.

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REIMBURSEMENT REQUEST FOR EXPENDITURES THROUGH   Dec 31, 2023

GRANT NAME: Next-Generation Ammonia System Integration Utilizing Intermittent Renewable Power (REFUEL Integrations & Testing Program)

GRANT NUMBER:

PRINCIPAL INVESTIGATOR:

BUDGET PERIOD: 7/25/22 - 7/24/24

CATEGORY:	BUDGET AMOUNT	CURRENT AMOUNT	CUMULATIVE AMOUNT
1 SALARIES	66,364.00	3,120.28	44,180.01
2 FRINGE BENEFITS	2,275.00	14.04	1,999.55
3 TRAVEL	3,000.00	2,156.57	3,769.58
4 SUPPLIES	35,769.00	707.94	11,672.97
5 FIXED CHARGES	0.00	0.00	0.00
6 CONTRACTUAL SERVICES	0.00	0.00	22.90
7 CAPITALIZED EQUIPMENT	0.00	0.00	0.00
8 OTHER DIRECT COST	0.00	0.00	0.00
TOTAL DIRECT COST:	107,408.00	5,998.83	61,645.01
INDIRECT COST:	52,630.00	2,939.42	30,206.11
TOTAL COST:	160,038.00	8,938.25	91,851.12
COST SHARE (IF APPLICABLE):	100,000.00	2,196.07	42,860.98

By signing this report, I certify to the 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. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812).

TOTAL DUE
$8,938.25
Do not include Cost Share with Payment

CONTRACT NUMBER: CON0006798
PROJECT ID: 10012779
DEPT ID: 155100
BILLER04: Andrea Gack

Mandy M Kibler

Billing Authority: Mandy Kibler, Controller
                      University of South Carolina

PeopleSoft Standard Invoice

UNIVERSITY OF South Carolina

Comparing the Invoice with the Grant Dashboard

Grant Dashboard – Output Options

- The default output option is **Detail.**

- Use the drop down to select **Summary.**

- Select the applicable fiscal period. The default is the current month.

Grant Dashboard – Summary Output

Operating Unit

Department

Fund

Contract

Project

Project Status
Active

PI

Business Manager (BM)

Sponsor

Class

Fiscal Period
GL 2324 007-January [OPEN]

☐ Display Account Chartfield

Output
Summary

[Submit] [Clear] [CSV]

Project	Title	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
10012848	Project 47-Synthesis of Well	40,000.00	5,433.52	24,699.79	15,300.21		15,300.21			
10011280	REU Site: CO2 Chemical Engineering: Opportunities	413,036.00		252,220.45	160,815.55		160,815.55			
10013139	Fuel Flexible Gas Turbine Technology Integrated wi	100,000.00	4,965.29	28,261.69	71,738.31		71,738.31			
10012323	Design of New Catalysts for the Generation of Clea	587,990.00	9,893.39	416,698.46	171,291.54	2,115.00	169,176.54			
10012397	ONR - Development, Assessment and Simulation of En	138,437.00	3,008.47	93,403.36	45,033.64		45,033.64			
10012847	Project 47-Synthesis of Well	15,000.00		10,921.12	4,078.88	1,241.25	2,837.63			
10013138	Fuel Flexible Gas Turbine Technology Integrated wi	453,201.00	8,783.01	90,090.98	363,110.02		363,110.02			
10010963	Compact Catalytic Membrane	449,855.00	11,474.50	377,368.11	72,486.89		72,486.89	133,939.00	133,570.16	368.84
10012779	Next-Generation Ammonia System Integration Utilizi	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
10012395	ONR - Development, Assessment and Simulation of En	416,002.00	13,757.34	311,676.22	104,325.78	17,462.65	86,863.13			
10012324	Design of New Catalysts for the Generation of Clea	400,000.00	13,335.96	250,262.00	149,738.00		149,738.00			

		Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
REPORT TOTAL		3,173,559.00	74,441.86	1,951,243.68	1,222,315.32	20,818.90	1,201,496.42	233,939.00	177,570.82	56,368.18

- Shows totals for each project using the selected criteria.

- Provides a **Report Total.**

- In this example, we are looking at **Active** projects for **a specific PI**.

- Can drill down into detail view by selecting any of the project numbers on the screen.

UNIVERSITY OF South Carolina

Grant Dashboard – Detail Output

- This is the default output option.

- Provides the project detail for all the projects the specific PI is responsible for.

- In this example, we are looking at **Active** projects for **a specific PI.**

- Can drill down into detail view by selecting any of the active links on the screen.

Grant Dashboard – Search Criteria

Provides the ability to view by single project, contract, PI or Sponsor.

- As the PI, your USCID will auto populate in the PI field.

- Search by Contract for grants with multiple projects or by a Specific Project.

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

- For today's example, we will search by **Project** for fiscal period
  2224 - January.

Grant Dashboard – Project Details

Here you can view the Project name, contract number, beginning/end date, Sponsor, and Project Team.

10012779

Next-Generation Ammonia System Integration Utilizi

University at Buffalo, SUNY

CON0006798
R1344198 DE-AR0001479

07/25/2022-07/24/2024
[23.9 months]

Operating Unit	Department	Fund	Class
CL040 **ENGINEERING - COMPUTING**	155100 **CHEMICAL ENGINEERING RESEARCH**	F1000 **FEDERAL GRANT**	202 **INDIVIDUAL AND PROJECT RSRCH**

PROJECT TEAM

Role	Name	USCID	Email
APPRV_1	Wagner,Alicia		alewin@mailbox.sc.edu
CGA	Gack,Andrea Lynn		agack@mailbox.sc.edu
PI	Lauterbach,Jochen Anton		lauteraj@mailbox.sc.edu

Apprv_1 is your **Grant Administrator**

UNIVERSITY OF South Carolina

Grant Dashboard – Data Review

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	2,543.88	64,188.89	43,219.11		43,219.11	74,349.00	32,380.86	41,968.14
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34

- Total Budget for the project.

- Current Month Activity by each category.

- Balance equals the Budget minus the Life to Date Expenses.

- If there are encumbrances, they will populate in the Encumbrances column and be deducted to calculate the Available Balance.

- View cost share budget and actuals.

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Data Review - Encumbrances

- Encumbrances represent open purchases orders and obligations on the project; common examples include:
  - Subawards
  - Consultants
  - Equipment purchases
  - Other Contractual services

- Encumbrances **reduce your available balance**; must be reviewed regularly.

- De-obligation of encumbrances occur two different ways:
  1. **Subawards** – The final invoice must be received and paid prior to closing a purchase order related to a subaward. Closure and de-obligation of any subaward must be submitted to the Subaward Accountant (subinv@mailbox.sc.edu) to ensure needed coordination with the SAM Office occurs.
  2. **All Others** – Coordinate with your Business Manager to request closure directly to the purchasing office. (purchase@mailbox.sc.edu)

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Data Review – Cost Share

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	2,543.88	64,188.89	43,219.11		43,219.11	74,349.00	32,380.86	41,968.14
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34

- Portion of project costs not provided by the Sponsor.

- Most sponsors expect cost share to be charged in **ratio** throughout the life of the project.

- Be sure to work with your Business Manager or Grant Administrator at the beginning of the funding to set this up appropriately.

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Search Criteria – Display Account Details

- Select **Display Account Chartfield** to expand the Categories.

- Expanded view will display the account codes that roll into each category.

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	66,364.00			66,364.00		66,364.00	38,720.00		38,720.00
51300 UNCLASSIFIED EMPLOYEES			5,415.35	(5,415.35)		(5,415.35)		17,817.52	(17,817.52)
51400 NON FED WORK STUDY STUDENTS		1,397.64	40,162.30	(40,162.30)		(40,162.30)			
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
51900 FRINGE BENEFITS		5.59	2,005.14	(2,005.14)		(2,005.14)		5,896.34	(5,896.34)
51995 FRINGE EXPENSES BUDGET	2,275.00			2,275.00		2,275.00	13,629.00		13,629.00
FRINGE BENEFITS	2,275.00	5.59	2,005.14	269.86		269.86	13,629.00	5,896.34	7,732.66
52010 FREIGHT,EXPRESS AND DELIVERIES			22.90	(22.90)		(22.90)			
CONTRACTUAL SERVICES			22.90	(22.90)		(22.90)			
52022 STUDENT TRAVEL			2,156.57	(2,156.57)		(2,156.57)			
52024 USC EMPLOYEE TRAVEL DOMESTIC	3,000.00	159.82	1,772.83	1,227.17		1,227.17			
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
53000 SUPPLIES	35,769.00			35,769.00		35,769.00			
53004 DATA PROCESSING SUPPLIES			248.39	(248.39)		(248.39)			
53025 LAB SUPPLIES		980.83	12,195.41	(12,195.41)		(12,195.41)			
53031 COMP SOFTWARE UNDER $100,000			210.00	(210.00)		(210.00)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			
54525 GRADUATE ASSISTANT TUITION SUP							22,000.00	8,667.00	13,333.00
SCHOLARSHIPS							22,000.00	8,667.00	13,333.00
DIRECT EXPENSE	107,408.00	2,543.88	64,188.89	43,219.11		43,219.11	74,349.00	32,380.86	41,968.14
59990 INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT COST RECOVERY	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
INDIRECT EXPENSE	52,630.00	1,246.50	31,452.61	21,177.39		21,177.39	25,651.00	11,619.80	14,031.20
TOTAL EXPENSE	160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34

Data Review – Account Details

- Monthly activity ties to USC's standard invoice sent to Sponsors to request reimbursement.

- Be sure to review the report you receive monthly for your projects ensuring the expenses are accurate.

- Any questions regarding expenses should be directed to your assigned Grant Administrator.

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Hello,

Your monthly sponsored award summary report is now ready! This report will provide you a listing of all your active sponsored award projects and their available balances. To view; please select the link provided below. You may also log directly into the Grant Dashboard on the Finance Intranet to view this data.

Click here to view your Grant Dashboard.

Don't forget - you can drill down into the transactions by clicking the hyperlinks in the report! A job aid for using the Grant Dashboard is available on the Controller's Office website.

If you have questions regarding one of your projects, please reach out to your business manager or post award accountant.

Thank you,

University of South Carolina
Controller's Office
1600 Hampton Street
Columbia, SC 29208
(803) 777-2602

Sponsored Award Monthly Summary Report

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Drill Down – Salaries

GL 2324 007-January [OPEN] as of 01/23/2024 02:59 [19 months]

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
51000 SALARIES	66,364.00			66,364.00		66,364.00	38,720.00		38,720.00
51300 UNCLASSIFIED EMPLOYEES			5,415.35	(5,415.35)		(5,415.35)		17,817.52	(17,817.52)
51400 NON FED WORK STUDY STUDENTS		1,397.64	40,162.30	(40,162.30)		(40,162.30)			
SALARIES	66,364.00	1,397.64	45,577.65	20,786.35		20,786.35	38,720.00	17,817.52	20,902.48
51900 FRINGE BENEFITS		5.59	2,005.14	(2,005.14)		(2,005.14)		5,896.34	(5,896.34)
51995 FRINGE EXPENSES BUDGET	2,275.00			2,275.00		2,275.00	13,629.00		13,629.00

- Provides the ability to drill down into the expense activity. This provides PIs with the capability to view the specific $ amounts for their students (not just % of effort).

- Click on the expense you want to see for additional detail and information.

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Drill Down – Salaries

- Can view specific payroll data by drilling down clicking the **HCM** hyperlink.

Drill Down – Expenses

Category	Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
TRAVEL	3,000.00	159.82	3,929.40	(929.40)		(929.40)			
53000 SUPPLIES	35,769.00			35,769.00		35,769.00			
53004 DATA PROCESSING SUPPLIES			248.39	(248.39)		(248.39)			
53025 LAB SUPPLIES		980.83	12,195.41	(12,195.41)		(12,195.41)			
53031 COMP SOFTWARE UNDER $100,000			210.00	(210.00)		(210.00)			
SUPPLIES	35,769.00	980.83	12,653.80	23,115.20		23,115.20			

GL Activity

FP = 007 AND REGEXP_LIKE(JOURNAL_STATUS, '[PU]') AND INVOICE_TREE LIKE '%|%SUPPLIES%' AND (PROJECT LIKE '10012779%' OR OLD_PROJECT LIKE '10012779%')

ACTUAL2324 as of 01/23/2024 03:14		Journal ID	Journal Date	Posted Date	Amount	Line Description	Reference	Source
2324-7	CL040-155100-F1000-53025-202-10012779-1- - -	EXA0178804	01/16/2024	01/16/2024	33.15	Expense Accruals	SHT3000171642	EX
	Drummond,Samuel	Drummond,Samuel			PCARD24164073342105222804497-21963151211			
2324-7	CL040-155100-F1000-53025-202-10012779-1- - -	EXA0178804	01/16/2024	01/16/2024	781.38	Expense Accruals	SHT3000171642	EX
	Drummond,Samuel	Drummond,Samuel			PCARD24789303337770200143755-41931812043			
2324-7	CL040-155100-F1000-53025-202-10012779-1- - -	EXA0179028	01/17/2024	01/18/2024	153.98	Expense Accruals	SHT3000171894	EX
	Bartl,Johanna Adriana	Bartl,Johanna Adriana			PCARD24055233347762329805301-12308941214			
2324-7	CL040-155100-F1000-53025-202-10012779-1- - -	EXU0179031	01/18/2024	01/18/2024	12.32	Expense Use Tax Accruals	3000171894	EXU
- TOTAL					(980.83)			

- Provides the ability to drill down into the expense activity.

UNIVERSITY OF **South Carolina**

Drill Down – Expenses

- Provides the ability to drill down into the expense activity.

Grant Dashboard – How to Use the Burn Rates

Category		Budget	Current Month Activity	Life to Date Expenses	Balance	Encumbrances	Available Balance	Cost Share Budget	Cost Share Actual	Balance
TOTAL EXPENSE		160,038.00	3,790.38	95,641.50	64,396.50		64,396.50	100,000.00	44,000.66	55,999.34
BURN RATE	(dollars)	6,696.15		5,033.76		**COST SHARE RATIO**		62.49%	46.01%	
	(%)	4.18%		75.17%						

Total Budget/Life of Project
160,038.00/23.9 months = 6,696.15

Life to Date Expenses/Months to Date
95,641.50/19 months = 5,033.76

Monthly Budget Burn Rate/Total Budget
6,696.15/160,038.00 = 4.18%

Life to Date Monthly Burn Rate/Monthly Budget Burn Rate
5,033.76/6696.15 = 75.17%

- Burn Rates can be used to see the rate at which a budget is being spent.
- Can assist with the development of a spending strategy at the beginning and throughout an award.
  - Remember: Be mindful of the timing of purchases on your awards.
    - Purchasing large pieces of equipment, tuition expenses, etc. can cause spending spikes and the rates to be skewed.

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Inactive Project

10011832			*INACTIVE*
SC CCR&R PDG Family	**SC Dept of Social Services**	CON0005687 4400026259	04/30/2022-04/29/2023 [12 months]

Operating Unit	Department	Fund	Class
CL039 **EDUCATION**	152200 **COE CHILD DEV RESEARCH CTR**	G1000 **STATE GRANT**	301 **COMMUNITY SERVICE**

PROJECT TEAM

Role	Name	USCID	Email
BM	Judge,Tara M		judgetm@mailbox.sc.edu
CGA	Koon,Denise Frick		ddkoon@mailbox.sc.edu
PI	McDonald,Melissa Jane		mm116@mailbox.sc.edu

- Inactive projects will return as yellow.

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Demonstration

- Using the Grant Dashboard

Grant Dashboard Key Take-Aways

- **Fiscal Period** always defaults to current period.

- **Project Status** always defaults to active.

- The PI Field will default to your user ID.

- Use the Summary and Detail Output options to view more data.

- **Display Account Chartfield** checkbox will show all account information.

- Balance equals the Budget minus the Life to Date Expenses.

- Look at Cost share, the portion of project costs not provided by the sponsor.

- Remember, most sponsors expect cost share to be charged in **ratio** throughout the life of the project.

- All expense questions should be routed through your assigned Grant Administrator.

- This is the preferred tool when reviewing grants (USCSP projects 100xxxxx).

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Financial Reports: Non-USCSP Project Dashboard

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Finance Reports – Non-USCSP Project Dashboard

- Select Financial Reports, then Non-USCSP Project Dashboard.

Non-USCSP Project Dashboard – Search Criteria

- Use this report to view projects that have ended or are ending. Use the drop-down menu for sort options

- Inactive projects are yellow.

- Encumbrances can be closed with Purchasing so that projects drop off the report.

Remember: Projects that have ended need to either be extended or closed out and inactivated.

Non-USCSP Project Dashboard – Data Review

- All the Non-USCSP Projects (USCIP, USCSA, and USCEN) will return for the Operating Unit entered.

- In this example, we entered CL044 totaled by Project End Date.

- The returned results include the Project number, Type of Non-USCSP project, Status, **PI, Department Name**, and End date.

- Inactive are yellow.

Non-USCSP Project Dashboard – Data Review

Search By:

- Operating Unit and Fund "letter" using a wildcard
- PS Business Unit
- Totaled by Fund

Non-USCSP Project Dashboard – Data Review

GL 2324 005-November [OPEN] as of 11/01/2023 02:59

Project	PCBU	Project Name	PI	Status	End Date	Op.Unit	Dept	Dept Name	Fund	Cash	Encumbrances	Balance
80001355	USCIP	START-UP FUNDS - BUCKHAULTS		ACTIVE	06/30/2028	CL032	111100	DRUG DISCOVERY AND BIOMED SCI	EN300	22,642.11	9,742.96	12,899.15
80001743	USCIP	START-UP FUNDS - KIARIS		ACTIVE	06/30/2028	CL032	111100	DRUG DISCOVERY AND BIOMED SCI	EN300	4,945.18		4,945.18
80001886	USCIP	STARTUP BRYAN LOVE		ACTIVE	06/30/2030	CL032	111500	CLINICAL PHARM AND OUTCOME SCI	EN300	2,412.70		2,412.70
EN300 TOTAL										29,999.99	9,742.96	20,257.03
80000067	USCIP	RESEARCH INCENTIVE		ACTIVE	06/30/2028	CL032	111000	COLLEGE OF PHARMACY	EN700	890,672.31		890,672.31

- Review the balances by fund letter.

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

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Non-USCSP Project Dashboard – Data Review

Search By:

- Review projects by type.

- Inserting a wildcard sign in place of the fund letter will bring back projects for that category.

- %700 for instance will bring back all incentive projects.

Non-USCSP Project Dashboard – Data Review

- Review the balances by category.

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

Demonstration

- Using the Non-USCSP Project Dashboard
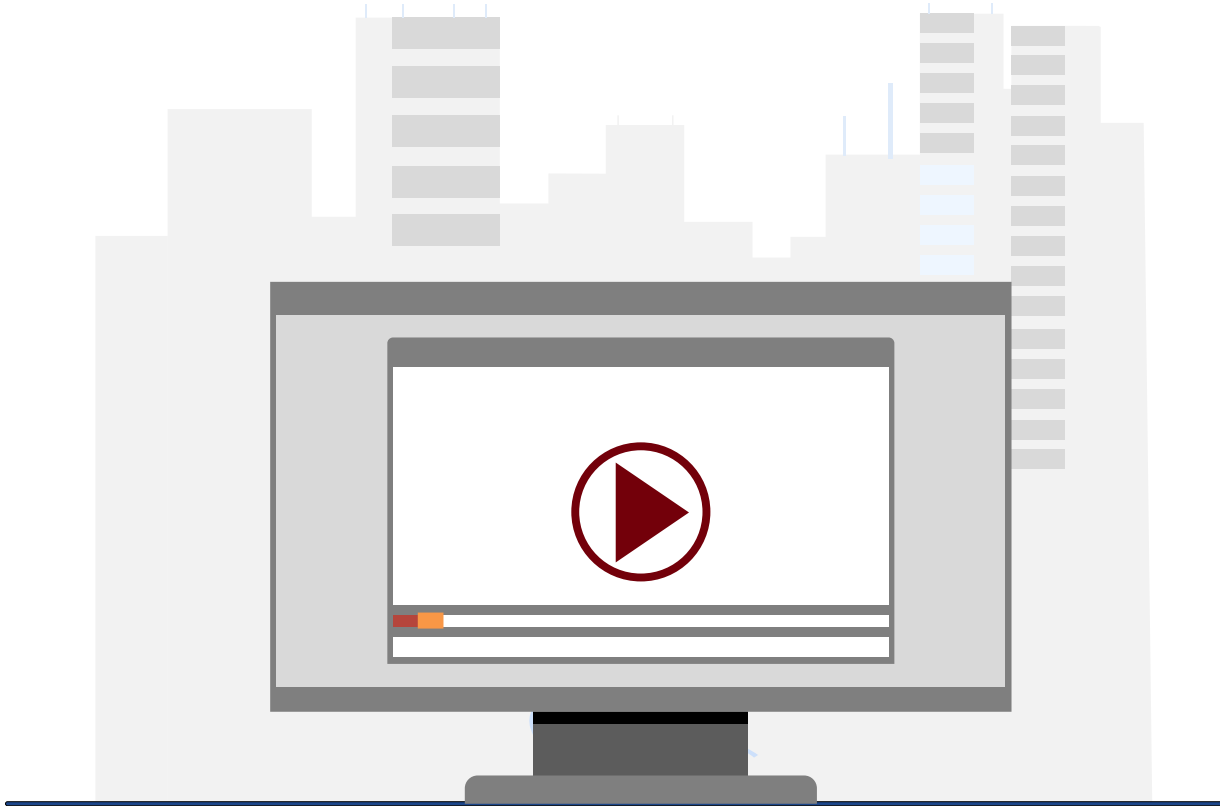
Non-USCSP Project Dashboard
Key Take-Aways

- Use this tool to view all of your non-sponsored projects at the same time.

- Helpful to run at the end of each month to determine what projects need to be inactivated, funded, or extended.

- Provides end date, current cash balance, and outstanding amount of any purchase orders

- The projected cash balance is a combination of the actual cash balance and any outstanding commitments or encumbrances.

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Financial Reports: GL Activity

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Finance Reports - GL Activity

- Select Financial Reports, then GL Activity.

GL Activity – Search Criteria

- Provides the same versatility as found in the GL Summary but at a detailed PeopleSoft transaction (journal) level.

GL Activity – Drill down

- To drill into the activity, click the specific expense you would like to view transaction details for within the system.

GL Activity – Drill down

To drill into the activity, click the specific expense you would like to view transaction details for within the system.

Demonstration

- Using the GL Activity

GL Activity Key Take-Aways

- GL Activity is the transaction-level detail behind the other Intranet reports.

- Hyperlinks drill directly into PeopleSoft Finance or HCM Distribution.

- Always review fiscal period and measure.

- Look up specific transactions using Journal IDs.

- Use Line Description and Reference to help search for transactions. This is where writing a good journal line description to reflect the purpose of the JE comes becomes very useful.

- Total and burst options are also available.

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Helpful Tips and Resources

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Some Helpful Tips

- The information in the Grants Dashboard should match the invoice created in Finance PeopleSoft unless a Sponsor requires the use of 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 may have 60 days to issue their final invoice.)
- Regularly review salary and effort and make any necessary adjustments timely.
- Remember **Encumbrances reduce** your available balance as they are obligations.
- Review Encumbrances regularly and work with your Grant Administrator to de-obligate and closeout encumbrances as needed to ensure access to available funding.
- Remember to be responsive to your Grant Administrator when they reach out about milestone completion as this affects invoicing.

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Common Issues

- Overbudget – Projects that are overbudget cannot be invoiced until rectified.
- ADVANCE/RISK Accounts cannot be invoiced; be aware of timing for project continuations.
- Must be based on actual expenses that the department posted to the ledger during the fiscal period; cannot make manual adjustments
- Expenses must fall within the period of performance. For example, equipment purchases should not be made a few days before a project ends or after it has ended.
- Cost share must be booked appropriately and within ratio to spending.
- For projects that have ended; final expenses must be confirmed timely so **Final invoices** can be prepared and submitted (within 30 days of end date).

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Where to Find Resources

For Grant Dashboard resources, visit the Monitoring Awards section on our Grant Administration page.

Contacts

10012779

Next-Generation Ammonia System Integration Utilizi   **University at Buffalo, SUNY**   CON0006798   07/25/2022-07/24/2024
R1344198 DE-AR0001479   [23.9 months]

Operating Unit	Department	Fund	Class
CL040 **ENGINEERING - COMPUTING**	155100 **CHEMICAL ENGINEERING RESEARCH**	F1000 **FEDERAL GRANT**	202 **INDIVIDUAL AND PROJECT RSRCH**

PROJECT TEAM

Role	Name	USCID	Email
APPRV_1	Wagner,Alicia		alewin@mailbox.sc.edu
CGA	Gack,Andrea Lynn		agack@mailbox.sc.edu
PI	Lauterbach,Jochen Anton		lauteraj@mailbox.sc.edu

If you have any questions regarding expenses or invoicing, please contact your Grant Administrator (**APPRV_1**).

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Our Grant Administration Team

Name	Title	Email
Susan Klie	Director of Grant Administration	SKLIE@mailbox.sc.edu
Melissa Bell	Grant Administrator	MB175@mailbox.sc.edu
Alicia Lewin	Grant Administrator	ALEWIN@mailbox.sc.edu
Alicia Stoll	Grant Administrator	ALSTOLL@cec.sc.edu
Jennifer Swanner	Grant Administrator	JSWANNER@cec.sc.edu

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Questions