1) Logging In:
   a. Access the website https://fbis.app.clemson.edu/
   b. Enter in your Clemson username (without the email) and password, authenticate with Duo

2) Main Page / User All Project List

Once you log in, you’re taken directly to a list of your Fund 10-20 projects, which include both your PI and CO-PI projects.

a) This shows a breakdown of your projects by type and includes detail on the project life percent (if applicable), budgets, actuals (expenses + encumbered), and project balances. Data is refreshed daily. These are direct expenditures only, and do not include indirect accounts like FACADM

b) Click the navigation menu to bring up a dialog box to filter by Project Status and Fiscal Year. Click the “X” to close

c) Quickly export your project list data to excel by clicking the green “Export User Project List” button

d) Click on a project to bring up a pop-up menu to View Direct Expenditures detail and click the link. For more info see page 3
Important Notes:
The Main Page / User All Project List will appear blank if the logged in user is not listed as a manager on any projects in the PeopleSoft system. You still have the ability to add projects in the bottom table.

It is best practice to review project direct expenditures after the monthly close period. The system captures journal entries that have been approved through Budget Check and are posted to the General Ledger. If you do not see the financials you would expect, it is possible the project is being held up in Budget Check. Please reach out to your Financial Analyst for more information. Clemson’s Monthly Closing Schedule can be found on the Controller's webpage.

For questions or concerns please contact fbis@clemson.edu

3) Adding Projects:

- Use the navigation menu next to “Add Projects” to bring up the dialog box
  - Type the Project ID and either click the plus icon, or hit enter and check the box to add projects to the view
  - Select desired fiscal year(s). If a project is an Annual Budget with multiple fiscal years, all years will show up automatically, but you can simply uncheck any fiscal years you do not want to see
- Click the “Clear List” to remove all projects in the view. Otherwise you can hover and click the “x” to deselect any projects
- Hit the “X” in the navigation menu to close the dialog box
- You can export the data to excel for the projects you’ve added by clicking the white “Export Added Projects” button

4) Saving Added Projects

- Restart the tool by refreshing the FBIS system in your browser
- Add the desired projects to the view (using the steps above)
- Scroll to the bottom of the webpage and click the “View: Original” icon
- In the dialog box type in a Name for the view, check the box next to “Make it my Default” and click Save

- Click the “Manage” button to delete any views you have saved. You can have multiple views
- You may have to go through this process again if the system experiences any upgrades
5) Direct Expenditures View

a) This provides a summary of the project selected.

b) This gives more financial detail by displaying the project’s overall Budget, Actuals (expenditures and encumbered), % of Budget Spent, and Project Balance by department ID and account.

c) Switch between Tabular (default) and Graphical View. The graphs provide various visual cues related to spending; hover over the purple Legend button for more details and definitions.

d) Download the data to excel by clicking the green “Export Direct Expenditures” button.

e) This allows you to select another project without having to go back to the Main Page. Only Fund 10-20 projects that you are a PI or CO-PI on will appear in the list. Simply select the Project, select the Fiscal Year, and click Apply.

f) Navigates back to the Main Page / User All Project List.

From this page you can also Select a Detail Report of either Journal Entries or Payroll Detail by using the dropdown menu. See page 4 for details.
6) Viewing Journal Entry and Payroll Detail

Once a report is selected it will bring up new data tables.

The **Journal Entries** view displays all entries for a project by date and account with additional detail.

<table>
<thead>
<tr>
<th>Entry</th>
<th>Account</th>
<th>Account Desc.</th>
<th>Journal ID</th>
<th>Jnl Line Desc.</th>
<th>Ref #</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/13/2019</td>
<td>GRAD</td>
<td>Grad Assl Sal Research</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>WAGES</td>
<td>Sal &amp; Wages Post Doctoral</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td>$1,187.88</td>
</tr>
<tr>
<td></td>
<td>FRINGE</td>
<td>Pooled Fringes - 12 Mo Emp</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td>$713.38</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pooled Fringes-Grad Students</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td>$84.34</td>
</tr>
<tr>
<td>9/11/2019</td>
<td>SUBCON</td>
<td>Sub Contracts &gt; $25,000</td>
<td>APP0722772</td>
<td>SC2027-207-2012546</td>
<td>K0031449</td>
<td>$11,152.18</td>
</tr>
<tr>
<td>8/30/2019</td>
<td>GRAD</td>
<td>Grad Assl Sal Research</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>WAGES</td>
<td>Sal &amp; Wages Post Doctoral</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td>$1,625.00</td>
</tr>
<tr>
<td></td>
<td>FRINGE</td>
<td>Pooled Fringes - 12 Mo Emp</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td>$713.38</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pooled Fringes-Grad Students</td>
<td>HRP0336GQS</td>
<td></td>
<td></td>
<td>$63.90</td>
</tr>
</tbody>
</table>

**Journal Entry Filters**

- **Select Fiscal Year**
  - [ ] (All)
  - [ ] 2020
  - [ ] 2019
- **Select Account(s)**
  - [ ] (All)
  - [ ] GRAD
  - [ ] WAGES
  - [ ] FRINGE
  - [ ] SPNGAD

**a)** Click on the navigation menu to Filter Journal Entries by Fiscal Year and/or Account. Once finished, click the “X” in the navigation menu to close the dialog box.

**b)** You can also directly download the data to excel by clicking the white “Export Journal Entries” button.

The **Payroll Detail** view displays a rollup of UCLASS, GRAD, WAGES, FRINGE, WAGET, and some TRAVEL and OTHER account entries by person.

<table>
<thead>
<tr>
<th>Entry</th>
<th>NAME</th>
<th>Account</th>
<th>Acct. Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/30/2019</td>
<td>WAGES</td>
<td>Sal &amp; Wages Post Doctoral</td>
<td>$1,625.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FRINGE</td>
<td>Pooled Fringes - 12 Mo Emp</td>
<td>$713.38</td>
<td></td>
</tr>
<tr>
<td></td>
<td>GRAD</td>
<td>Grad Assl Sal Research</td>
<td>$900.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FRINGE</td>
<td>Pooled Fringes-Grad Students</td>
<td>$63.90</td>
<td></td>
</tr>
<tr>
<td>9/13/2019</td>
<td>WAGES</td>
<td>Sal &amp; Wages Post Doctoral</td>
<td>$1,625.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FRINGE</td>
<td>Pooled Fringes - 12 Mo Emp</td>
<td>$713.38</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UCLASS</td>
<td>Uclass Sal - 12 mo</td>
<td>$988.54</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FRINGE</td>
<td>Pooled Fringes - 12 Mo Emp</td>
<td>$433.97</td>
<td></td>
</tr>
</tbody>
</table>

**Payroll Detail Filters**

- **Select Fiscal Year**
  - [ ] 2020YR
  - [ ] 2019YR
- **Select Name**
  - [ ] (All)

**a)** Click on the navigation menu to Filter Payroll Detail by Fiscal Year and/or Name. Once finished, click the “X” in the navigation menu to close the dialog box.

**b)** You can also directly download the data to excel by clicking the white “Export Payroll Detail” button.
7) Admin Access

This page is for Business Officers, Departmental Accountants, Grant Coordinators, or other personnel that assist faculty with their Fund 10-20 project financials and management. To request access please contact fbis@clemson.edu

Click the Admin Access in the top right corner of the Main Page

This view allows you to pull up a manager’s project list by typing the manager’s username in the box at the top of the screen. Start typing in the username and then press enter. From there, the functionality and navigation work exactly the same as the user/general views.

8) Exporting the Data – use the green or white “Export” buttons throughout the FBIS system to download the data to excel

9) Frequently Asked Questions

• If the financial amounts look incorrect:
  o It is best practice to review project direct expenditures after the monthly close period. The system captures journal entries that have been approved through Budget Check and are posted to the General Ledger. If you do not see the financials you would expect, it is possible the project is being held up in Budget Check. Please reach out to your Financial Analyst for more information. Clemson’s Monthly Closing Schedule can be found on the Controller’s webpage. https://www.clemson.edu/finance/controller/schedules/

• For Admin Access:
  o Email fbis@clemson.edu

• If the FBIS system is running slow/lagging
  o Please allow a few minutes for the system to load upon log in (it is connecting to a massive set of PeopleSoft financial data)
  o When clicking to View Direct Expenditures, please allow 5-10 seconds to load the next page
  o Try refreshing the browser page and starting from the main page again
  o If you are still experiencing issues, please contact fbis@clemson.edu

• If you leave the tool open and idle in your browser for a while, it will automatically time out and force restart you to the main page