

Faculty Business Information System (FBIS)

User Guide

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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.

Faculty Business Information System Admin Access

All Projects List (awimpey) *Financials exclude indirect FACADM accounts

Click on a Project to drill to Direct Expenditures by Account. Please allow 5-10 seconds to load

Export User Project List

Type	Project ID	Manager Name	Title	Beg-End Date / Fiscal Year	Project Life %	Budget	Actuals (Exp + Enc)	Project Balance
Research & Grants	2010822			8/1/2015 - 7/31/2019	100.0%	\$221,769.00	\$222,583.95	(\$814.95)
	2012546			6/1/2018 - 5/31/2022	33.4%	\$403,092.00	\$151,408.47	\$251,683.53
	2013444			8/1/2019 - 7/31/2024	3.4%	\$61,309.00	\$877.73	\$60,431.27
	2020921			9/1/2015 - 8/31/2019	100.0%	\$716,260.00	\$715,295.00	\$965.00
	2022815			10/1/2018 - 9/30/2021	33.4%	\$230,597.00	\$230,464.22	\$132.78
Annual Budgets	1000341			2020		\$61,740.00	\$0.00	\$61,740.00
	1280166			2020		\$27,989.90	\$11,715.92	\$16,273.98

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:

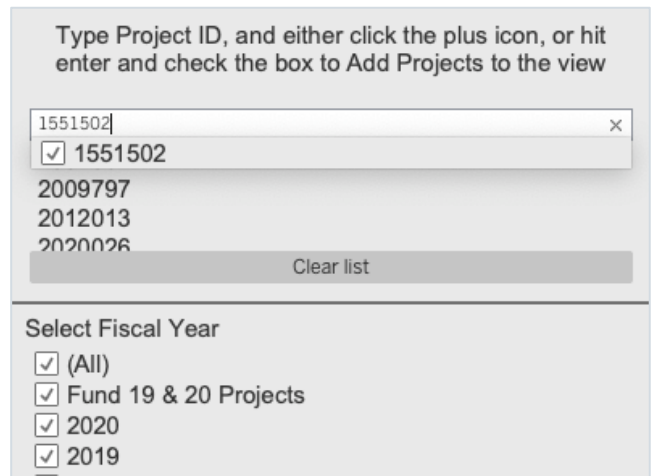
The Main Page / User All Project List will appear blank if the logged in user is not listed as a manager on any projects in the PeopleSoft system. You still have the ability to add projects in the bottom table.

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.

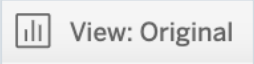
For questions or concerns please contact fbis@clermson.edu

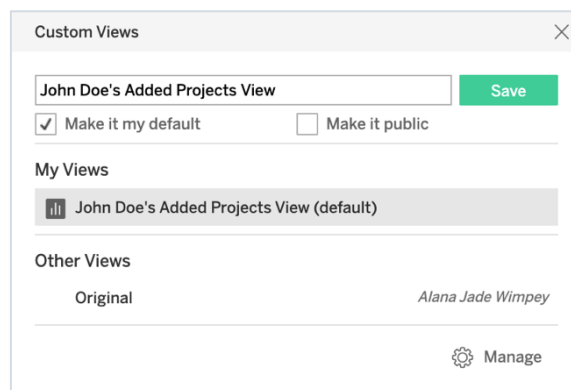
3) Adding Projects:

- 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

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5) Direct Expenditures View

Faculty Business Information System
[Back to User's Project List](#)

e Select Another Project and Fiscal Year:
(based on logged in user's project list)

Project ID	Manager Name	Title	Status	Beg-End Date /	Fiscal Year	Project Life %
2012546			Active	6/1/2018 - 5/31/2022		33.4%

Project Direct Expenditures

Hover to see more info, click the Project ID to drill to Payroll and Journal Entries

c
d

Dept ID	Account	Acct. Description	Budget	Expended	Encumbered	Ideal Spend	Project Balance	% of Budget Spent
Total			\$403,092.00	\$137,802.23	\$13,606.24	\$134,732.12	\$251,683.53	37.6%
0336	GRAD	Graduate Assistant Salaries	\$48,000.00	\$15,904.55	\$0.00	\$16,043.84	\$32,095.45	33.1%
	WAGES	Salaries & Wages	\$20,000.00	\$14,331.92	\$0.00	\$6,684.93	\$5,668.08	71.7%
	FRINGE	Employer Fringe Benefits	\$10,612.00	\$7,609.11	\$0.00	\$3,547.02	\$3,002.89	71.7%
	SPNGAD	Sponsored Program GAD	\$19,792.00	\$6,770.00	\$0.00	\$6,615.41	\$13,022.00	34.2%
	SUBCON	Sub Contracts	\$272,443.00	\$91,979.36	\$13,606.24	\$91,063.14	\$166,857.40	38.8%
	TRAVEL	Travel	\$18,000.00	\$622.44	\$0.00	\$6,016.44	\$17,377.56	3.5%
	OTHER	Other Operating Expenses	\$14,245.00	\$584.85	\$0.00	\$4,761.34	\$13,660.15	4.1%

- 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.

Select Detail Report

None
▼

☰ Filter Journal Entries

☰ Filter Payroll Detail

Export Journal Entries

Export Payroll Detail

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.

Entry	Account	Account Desc.	Journal ID	Jrnl Line Desc.	Ref #	Amount
Grand Total						\$134,100.86
9/13/2019	GRAD	Grad Asst Sal Research	HRP0336GQS			\$1,187.88
	WAGES	Sal & Wages Post Doctoral	HRP0336GQS			\$1,625.00
	FRINGE	Pooled Fringes - 12 Mo Emp	HRP0336GQS			\$713.38
		Pooled Fringes-Grad Students	HRP0336GQS			\$84.34
9/11/2019	SUBCON	Sub Contracts > \$25,000	APP0722772	SC2027-207-2012546	K0631449	\$11,152.18
8/30/2019	GRAD	Grad Asst Sal Research	HRP0336GPS			\$900.00
	WAGES	Sal & Wages Post Doctoral	HRP0336GPS			\$1,625.00
	FRINGE	Pooled Fringes - 12 Mo Emp	HRP0336GPS			\$713.38
		Pooled Fringes-Grad Students	HRP0336GPS			\$63.90

- 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
- You can also directly download the data to excel by clicking the white “Export Journal Entries” button

Journal Entry Filters

Select Fiscal Year

(All)

2020

2019

Select Account(s)

(All)

GRAD

WAGES

FRINGE

SPNGAD

SUBCON

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

Amount	Entry	NAME	Account	Acct. Description	Amount
\$39,766.72	Grand Total				\$39,766.72
\$11,691.90	9/30/2019		WAGES	Sal & Wages Post Doctoral	\$1,625.00
\$1,856.48			FRINGE	Pooled Fringes - 12 Mo Emp	\$713.38
\$1,874.16			GRAD	Grad Asst Sal Research	\$900.00
\$16,871.40			FRINGE	Pooled Fringes-Grad Students	\$63.90
\$647.47			GRAD	Grad Asst Sal Research	\$316.67
\$6,825.31			FRINGE	Pooled Fringes-Grad Students	\$22.48
	9/13/2019		WAGES	Sal & Wages Post Doctoral	\$1,625.00
			FRINGE	Pooled Fringes - 12 Mo Emp	\$713.38
			UCLASS	Uclass Sal - 12 mo	\$988.54
			FRINGE	Pooled Fringes - 12 Mo Emp	\$433.97

- 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
- You can also directly download the data to excel by clicking the white “Export Payroll Detail” button

Payroll Detail Filters

Select Fiscal Year

2020YR

2019YR

Select Name

(All)

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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@clermson.edu

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

An orange rectangular button with the text "Admin Access" in white.

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.

A dark grey rectangular input field with the label "Type Manager Username" in white text above it. The text "ACHOW" is entered in the field.

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