

Tableau Dashboard Tutorial: Faculty Business Information Systems (FBIS) Dashboard

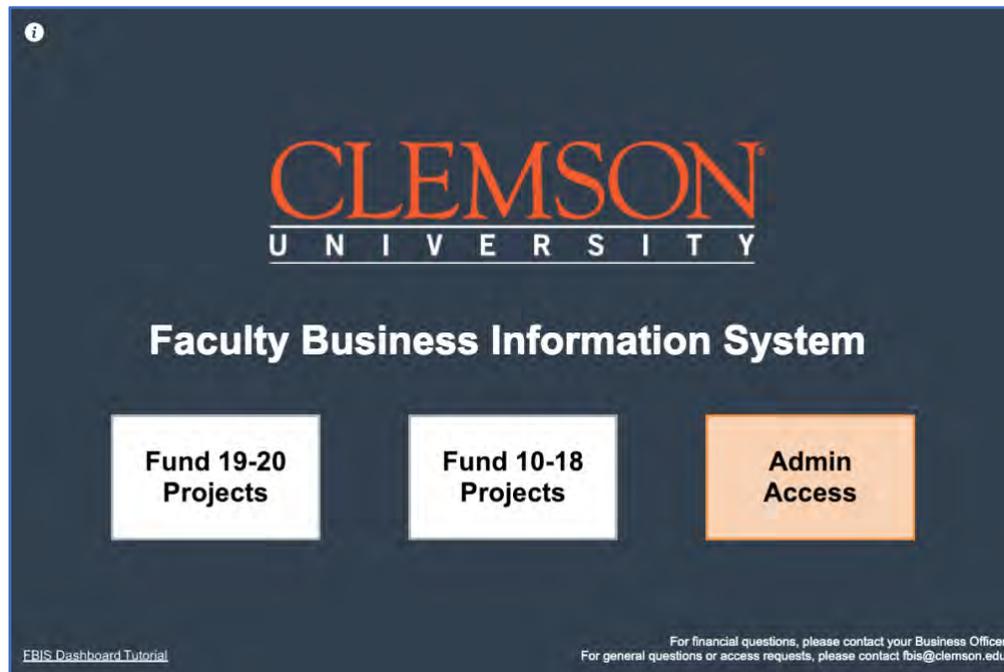
It is best practice to review project direct expenditures after the monthly close period. The system captures journal entries that have been approved through Budget Check and are posted to the General Ledger. If you do not see the financials you would expect, it is possible the project is being held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

<https://www.clemson.edu/finance/controller/schedules/>

1. Access tool at <https://fbis.app.clemson.edu/>

A login form for the FBIS system. At the top is the Clemson University logo. Below it are two input fields: 'Username' and 'Password'. At the bottom is a blue button labeled 'Sign In →'.

2. Enter your Clemson University credentials (username without the email attached)
3. After logging in, you will see the FBIS Main Page.

The main page of the Faculty Business Information System. It features the Clemson University logo at the top. Below the logo is the title 'Faculty Business Information System'. There are three buttons: 'Fund 19-20 Projects', 'Fund 10-18 Projects', and 'Admin Access'. At the bottom left, there is a link to the 'FBIS Dashboard Tutorial'. At the bottom right, there is contact information for the Business Officer and a link to fbis@clemson.edu.

- Click the Fund 19-20 or Fund 10-18 buttons to see a list of All User Projects
 - For a list of Fund descriptions please visit the [CUBS Chart of Accounts](#)
- For **financial questions**, please contact your **Business Officer**
- For **general questions** or **Admin Access** requests, please contact fbis@clemson.edu
- Access this FBIS Dashboard Tutorial in the future by clicking the link in the bottom left

4. **Fund 19 & 20 All Projects View** - In the top table, Principal Investigators (PI's) will be able to see all of their associated Fund 19-20 projects, along with a snapshot of their budgets, actuals (expenses + encumbered), project balances, and project life percent. Data is refreshed daily. These are direct expenditures only, and **do not include indirect** accounts
- Projects that you manage will appear at the top of the table, while your CO-PI projects appear at the bottom
 - Use the Status dropdown menu to show/hide Active or Inactive projects.
 - If a project is in orange, it is within 90 days of the project End Date. Hover for info.
 - Click on the Home icon (top right) to return to the Main Page

Faculty Business Information System

All Projects

Fund 19 & 20 Project List *Now includes CO-PI Projects

Status: Active

*Fund 20 financials exclude Indirect FACADM accounts

Click on a Project to view Direct Expenditures by Account

| Status | Project ID | Manager Name | Title | Beg-End Date | Budget | Actuals (Exp + Enc) | Project Balance | Project Life % |
|--------|------------|----------------------|---|-----------------------|-----------|---------------------|-----------------|----------------|
| Active | 2009850 | Doe, John | Impact of Prescribed Fire on Polycyclic Aromatic Hyd.. | 1/1/2014 - 12/31/2018 | \$347,907 | \$349,655 | (\$1,748) | 100.0% |
| PI | 2010366 | Doe, John | Ecological Stress in Coastal Ecosystems: Exploring t.. | 9/18/2014 - 9/18/2017 | \$33,386 | \$33,386 | \$0 | 100.0% |
| | 2010822 | Doe, John | Collaborative Research: Halocarbon Biogeochemistr.. | 8/1/2015 - 7/31/2019 | \$221,769 | \$148,987 | \$72,782 | 88.1% |
| | 2012546 | Doe, John | Storage, Reactivity, and Bioavailability of Mercury in .. | 6/1/2018 - 5/31/2022 | \$403,092 | \$53,415 | \$349,677 | 17.2% |
| CO-PI | ██████████ | Conner, William H | Retreat of Tidally Influenced Freshwater Forested W.. | 5/15/2014 - 5/14/2019 | \$170,210 | \$154,557 | \$15,653 | 94.7% |
| | ██████████ | Keranfil, Tanju | Forest Watershed Mgmt. Practices & DW Quality | 9/1/2015 - 8/31/2019 | \$717,267 | \$649,747 | \$67,520 | 94.7% |
| | ██████████ | O'Halloran, Thomas L | MRI: Acquisition of a Soil Greenhouse Gas Flux Mea.. | 10/1/2018 - 9/30/2021 | \$230,597 | \$230,463 | \$136,134 | 100.0% |

Additional Projects:

To add projects, enter Project ID into the box:

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DW Load: 2/7/2019
Data Refreshed as of 2/7/2019 8:38:22 AM

How to Save Added Projects How to Export Data

- a) **Add Projects** – to add projects, simply type in the Project ID into the box, hit enter, and click the check box that pops up.
- To **remove** it, hover over the added ID and click the “x” that pops up
 - Can add unlimited number of projects, just scroll down to see those out of the view

Additional Projects:

To add projects, type Project ID into the box:

| Project ID | Project Title | Begin Date | End Date | Manager Name | Status | Project Life % |
|------------|--|------------|----------|------------------------|----------|----------------|
| 2009797 | Broadening Participation in Visualization Workshop | 10/23/2013 | 6/1/2014 | Byrd, Vetricia Laverne | Inactive | 100.0% |

2009797 + P

2009797 [x]

*For info on saving added projects, see “Saving the View” on page 8

- b) To **Drill Down** to more financial detail, in either table, click on the Project ID to bring up the menu and then click View Direct Expenditures. (Ignore the SUM of Measure Values info).

2012013 CTE-Mismatch Effects in Multi-Material Aut

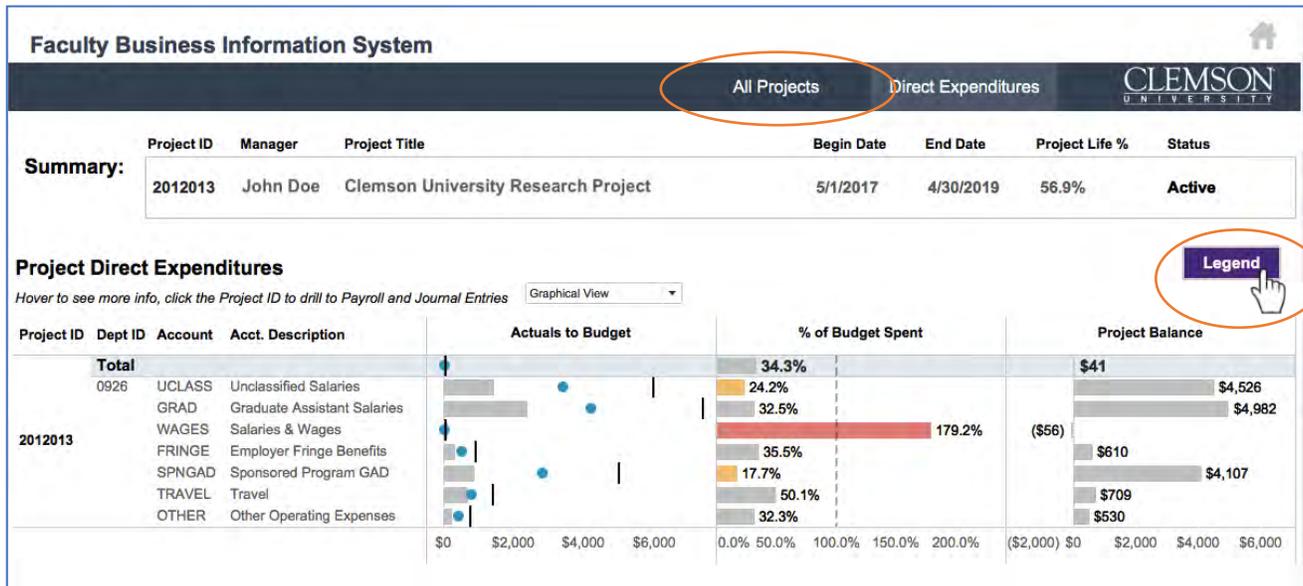
2009797 4 items selected - SUM of Measure values: 430,115 We

201012012013

20106 View Direct Expenditures

2011246 Cost-Effective Forming of Ultra High Streng

5. **Direct Expenditures View** – this shows each project’s overall Budget, Actuals (expenditures and encumbered), % of Budget Spent, and Project Balance, along with expenditure detail by account.
- Hover over the Legend button to see definitions and more detail.
 - Throughout the dashboard, you can use the buttons in the navigation bar (Ex: “All Projects”) to go back to previous pages.



Legend & Definitions:

Actuals to Budget:

- **Actuals** (Expended + Encumbered): what was spent or encumbered on the account
- | **Budget:** predetermined budget set for each account and overall project
- **Ideal Spend:** calculates the amount that should have been spent as of today, relative to project life. Formula: Budget * Project Life Percent

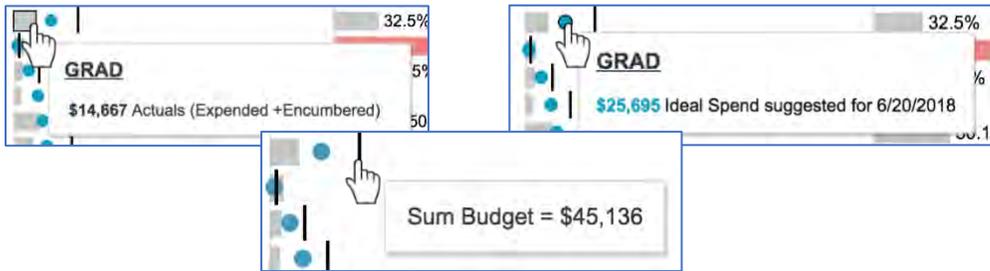
% of Budget Spent:

The “target” Percent Budget Spent should equal the Project Life Percent

- **On Track:** the expenditures are in a good position relative to project life percent
- **Ahead of Schedule:** the expenditures and associated Percent of Budget Spent are 50% above the Project Life Percent OR the project is **Over Budget** (100% is the Budget limit, anything over will turn red)
- **Behind Schedule:** the expenditures and associated Percent of Budget Spent are 50% below the Project Life Percent

***Note** – The bar colors correspond to the rate of spending relative to project life, therefore while some accounts may be colored red or yellow, it is understood that not all expenditures are spent evenly over the project life (some may require more upfront or back-end expenditures).

- Hover over the graphs to see additional details on the account and overall project



- a) You can also see an alternative view of information by clicking the dropdown menu and selecting **Tabular View**

Project Direct Expenditures Legend

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

Tabular View

| Project ID | Dept ID | Account | Acct. Description | Budget | Expended | Encumbered | Ideal Spend | % of Budget Spent | Project Balance |
|--------------|---------|---------|-----------------------------|----------------|-----------------|------------|----------------|-------------------|-----------------|
| Total | | | | \$3,397 | \$73,776 | \$0 | \$1,934 | 34.3% | \$2,232 |
| | 0926 | UCLASS | Unclassified Salaries | \$28,076 | \$10,896 | \$0 | \$15,983 | 24.2% | \$21,269 |
| | | GRAD | Graduate Assistant Salaries | \$2,558 | \$14,667 | \$0 | \$1,456 | 32.5% | \$1,727 |
| 2012013 | | WAGES | Salaries & Wages | \$291 | \$6,424 | \$0 | \$165 | 179.2% | (\$230) |
| | | FRINGE | Employer Fringe Benefits | \$2,484 | \$6,215 | \$0 | \$1,414 | 35.5% | \$1,603 |
| | | SPNGAD | Sponsored Program GAD | \$14,035 | \$5,120 | \$0 | \$7,990 | 17.7% | \$11,546 |
| | | TRAVEL | Travel | \$3,729 | \$17,529 | \$0 | \$2,123 | 50.1% | \$1,861 |
| | | OTHER | Other Operating Expenses | \$1,799 | \$12,925 | \$0 | \$1,024 | 32.3% | \$1,217 |

- b) Click on the Project ID to bring up a menu to drill down to **View Payroll Detail** or **View Journal Entries**

The screenshot shows a dropdown menu for the Project ID '2012013'. The menu is open, showing the following items: 'WAGES Salaries & Wages', 'FRINGE Employer Fringe Benefits', and '48 items selected · SUM of Measure Values: 277,236'. Below these items, there are two links: 'View Payroll Detail' and 'View Project Journal Entries'.

6. Payroll Detail View – this view of expenditures includes UCLASS, GRAD, WAGES, and FRINGE by person paid on the specific project.

- **Table 1** shows each person paid on the project.
- Click on a person’s name to bring up **Table 2** to see the accounts they have been paid on.
- On **Table 2**, hover above the Account Description and click the [+]
that appears to see all the associated journal entries along with the entry date and journal ID. It is ordered by year, so your most recent entries appear at the top.
- Again, you can **navigate back** to previous pages by clicking on the “All Projects,” “Direct Expenditures”, or Home buttons at the top of the screen.

Faculty Business Information System
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All Projects
Direct Expenditures
Payroll Detail

| Summary: | Project ID | Manager Name | Title | Status | Beg-End Date | Project Life % |
|----------|------------|--------------|---|--------|----------------------|----------------|
| | 2012345 | Doe, John | CTE-Mismatch Effects in Multi-Material Automotive Structures - Phase II | Active | 5/1/2017 - 4/30/2019 | 88.8% |

1. Project Payroll by Person

Click on a person to see account detail

| Person | Amount |
|-------------------------|-----------------|
| Grand Total | \$45,296 |
| Abu-Farha,Fadi Kamal | \$45,296 |
| Agha,Akshat | \$0.00 |
| Allurk,Rakan | \$0.00 |
| Gopinath Kannadasan,Fnu | \$0.00 |
| Goyal,Abhishek | \$0.00 |
| Raveendran,Aravindhan | \$0.00 |

2. Payroll Account Detail

Hover above the Account Description and click the plus icon [+]
that appears to drill to journal entries

| Grand Total | | | | Account Total | \$45,296 |
|-------------|------|------------------------------|----------------------|-----------------|----------|
| 2019YR | 5053 | Uclass Salaries - Summer Pay | | \$18,264 | |
| | | | 8/15/2018 HRE0926FO9 | \$5,708 | |
| | | | 7/31/2018 HRE0926FN9 | \$6,849 | |
| | | | 7/13/2018 HRE0926FM9 | \$5,708 | |
| | 5220 | Pooled Fringes - 9 Month Emp | | \$6,155 | |
| | | | 8/15/2018 HRE0926FO9 | \$1,923 | |
| | | | 7/31/2018 HRE0926FN9 | \$2,308 | |
| | | | 7/13/2018 HRE0926FM9 | \$1,923 | |
| 2018YR | 5053 | Uclass Salaries - Summer Pay | | \$15,925 | |
| | | | 6/29/2018 HRE0926FL9 | \$5,028 | |
| | | | 8/15/2017 HRE0926EO9 | \$5,189 | |
| | | | 7/31/2017 HRE0926EN9 | \$5,708 | |
| | 5220 | Pooled Fringes - 9 Month Emp | | \$4,953 | |
| | | | 6/29/2018 HRE0926FL9 | \$1,564 | |
| | | | 8/15/2017 HRE0926EO9 | \$1,614 | |
| | | | 7/31/2017 HRE0926EN9 | \$1,775 | |

DW Payroll Load: 2/7/2019
 *Payroll by person includes CLASS, UCLASS, GRAD, WAGES, WAGET, FRINGE, and some TRAVEL and OTHER accounts

7. Project Journal Entries View– this includes subtotals of direct expenditures by department and account, along with individual journal entries on the account.

- **Table 1** displays subtotals of direct expenditures by department and account.
- Click on an account in **Table 1** to bring up **Table 2** to see all the individual journal entries submitted for that account. It is ordered so your most recent entries appear at the top of each subaccount.
- You may have the option to scroll down in **Table 2** to see more information that is out of the view.

Faculty Business Information System

All Projects
Direct Expenditures
Journal Entries

Summary:

| Project ID | Manager | Project Title | Begin Date | End Date | Project Life % | Status |
|------------|----------|-------------------------------------|------------|------------|----------------|--------|
| 2011054 | John Doe | Clemson University Research Project | 10/19/2015 | 10/31/2020 | 53.0% | Active |

1. Project Expenditure Totals by Account

Click on a Department or Account to see Journal Entry Detail

| Project ID | Dept ID | Account | Acct. Description | |
|--------------------|---------|--------------|--------------------------|-----------------|
| Grand Total | | | | \$94,003 |
| 2011054 | 0926 | Total | | \$94,003 |
| | | CLASS | Classified Salaries | \$0 |
| | | UCLASS | Unclassified Salaries | \$2,922 |
| | | WAGES | Salaries & Wages | \$43,461 |
| | | FRINGE | Employer Fringe Benefits | \$16,531 |
| | | PARTSP | Participant Support Cost | \$1,063 |
| | | TRAVEL | Travel | \$11,891 |
| | | OTHER | Other Operating Expenses | \$16,133 |

2. Project Journal Entries

| Account Desc. | Day of Jrnl Ent. | Journal ID | Jrnl Ref # | | |
|--------------------------------|----------------------------|------------------|------------|-----------------|-------|
| Grand Total | | | | \$11,891 | |
| TOS:Lodging | January 29, 2018 | APP0674962 | H0291041 | \$1,051 | |
| | November 6, 2017 | APP0670387 | H0286273 | \$977 | |
| | August 3, 2017 | APP0663487 | H0280642 | \$908 | |
| | April 7, 2017 | APP0653155 | H0272649 | \$933 | |
| | February 13, 2017 | APP0649551 | H0269064 | \$300 | |
| | February 6, 2017 | APP0649005 | H0268603 | \$798 | |
| | TOS:Meals Business Related | January 29, 2018 | APP0674962 | H0291038 | \$66 |
| | | | H0291040 | \$66 | |
| | | | H0291041 | \$66 | |
| November 6, 2017 | | APP0670387 | H0286273 | \$73 | |
| August 3, 2017 | | APP0663487 | H0280642 | \$192 | |
| April 7, 2017 | | APP0653155 | H0272649 | \$32 | |
| February 13, 2017 | | APP0649551 | H0269064 | \$64 | |
| February 6, 2017 | | APP0649005 | H0268603 | \$160 | |
| TOS:Mileage Personal Reimburse | | January 29, 2018 | APP0674962 | H0291041 | \$485 |
| | | November 6, 2017 | APP0670387 | H0286273 | \$505 |

8. **Fund 10-18 Views** – These projects are set up very similarly to the Fund 19-20, with the same drill down functions and view capabilities. The main difference is that since these are annualized budgets, you can select and change the Year/Budget Period to view.

Faculty Business Information System All Projects

Project List (johndoe) *Click on a Project ID to see Direct Expenditures by Account* Budget Period 2019YR

| Status | Project ID | Project Title | Budget | Actuals (Exp + Enc) | Project Balance |
|--------|------------|-----------------------------|--------------|---------------------|-----------------|
| Active | 1000001 | PSA One-Time Funding | \$79,616 | \$2,104 | \$77,512 |
| | 1000002 | PSA Speical Allocations | \$141,253 | \$0 | \$141,253 |
| | 1000003 | PSA Speical Allocations | \$547,086 | \$0 | \$547,086 |
| | 1000532 | Admin of dept progr | \$4,743,610 | \$305,792 | \$4,437,818 |
| | 1070053 | Startup-Nathan Smith | \$0 | \$19 | (\$19) |
| | 1100003 | 0144 SCAFRES & CUCES Dir | \$12,246 | \$0 | \$12,246 |
| | 1200000 | Default | \$12,743,431 | \$0 | \$12,743,431 |
| | 1200220 | PSA General Revenues | \$0 | \$1,248 | (\$1,248) |
| | 1201156 | PSA FB-RESCH | \$0 | (\$2,714) | \$2,714 |
| | 1280000 | F&A Holding | \$3,521,810 | \$0 | \$3,521,810 |
| | 1401089 | PSA & ECDEV General Revenue | \$5,847 | \$0 | \$5,847 |

Additional Projects:

1) To add projects, type Project ID into the box and select:

2) Click on a Project to view list of Budget Periods

| Project ID | Descr | Manager Name | Active |
|------------|---------------------------|--------------|--------|
| 1200091 | Short Course & Conf RESCH | Doe, Jane | Active |

3) Click on a Budget Period to drill to Financials

Budget Period

- 2019YR
- 2018YR
- 2017 2018YR [View Direct Expenditures](#)
- 2016 [View Direct Expenditures](#)
- 2015YR

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- a) For Funds 10-18, there is an additional step in the bottom table. Like Fund 19-20, to add projects, type in the Project ID into the box, hit enter, and click the check box that pops up. From there click on the Project ID to bring up the Budget Period history. Finally, select a Budget Period to bring up the menu to View Direct Expenditures for that year.

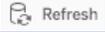
TIPS:

If the site has been idle a while in your browser and/or the drill downs are not acting as expected, you may need to refresh the site from your browser and restart from the Main Page

Avoid using browser back/forward buttons. Use navigation within the interface.

9. **Saving the View** – To save any projects you have manually added, you will need to create a custom view. Otherwise, the next time you log in, FBIS will revert to the original view and not display any projects you’ve added in the bottom tables. Use the following steps:

a) **Refresh the FBIS website in your Browser so it directs you back to the Main Page**

a. (NOT the refresh button in tableau  , this will only refresh the current view you are on)

b) Click the Fund 20 button and add any desired projects (refer to step 4a)

c) Click the HOME icon to return to the Main Page

d) Click the Fund 10-19 button and add any desired projects (refer to step 4a)

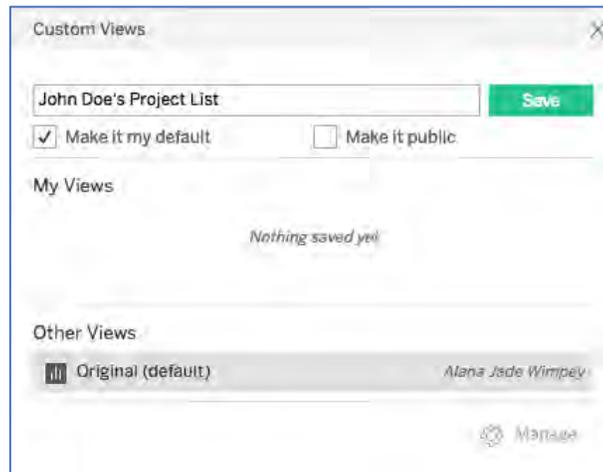
e) Click the HOME icon to return to the Main Page again. If one of the Fund buttons are highlighted blue, just click it again to unselect it.

***You will need to complete all of the above steps before saving the view that way each section is updated properly.

f) At the bottom of the screen, click the View Original icon to bring up the Custom Views dialog box.



g) From there, type in a Name for the view, check the box next to “Make it my default”, and click Save. You can also add multiple custom views and change the default from this menu.



10. Download the data – this option is available in the All Projects, Direct Expenditures, Payroll Detail, and Project Journal Entries views. At the bottom of the screen, click the Download icon.



***Be sure you are clicked into the graph/table you want to download. If not, the options will be greyed out or unavailable.

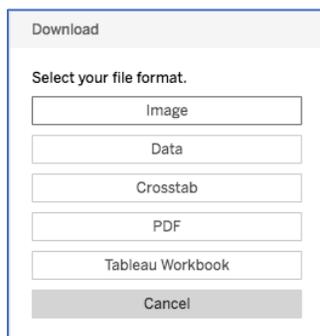


Image: Downloads a direct “screenshot” of the view. Therefore, you will not be able to see any projects that are hidden/you must scroll down to.

Data: Generates a pop-up window where you can view the raw data for a single row, or the full data table. From here you have the option to download the info as a text file.

- Due to the nature of the FBIS application tool (Tableau), you may see columns of data that are not relevant and were used for formatting purposes, just ignore these

Crosstab: ***Recommended format.** Downloads the data as a .csv file you can utilize in excel.

PDF: Generates a pop-up window with the following options:

- **Include:**
 - o **This View** – will download a direct “screenshot” of the view. Therefore, you will not be able to see any projects that are hidden/you must scroll down to.
 - o **Specific sheets from this dashboard** – *Recommended format. Best to use when you have many lines of data that you must scroll through in the view. It will download a pdf of any specific table and its data shown within the view. (Therefore, if you have not clicked to generate Table 2 and Table 3 on the Payroll Detail view, those pdf sheets will download blank). Example sheets for download:
 - List of All Projects
 - Add Projects
 - Direct Expenditures GRAPH
 - Direct Expenditures TEXT
 - Payroll High Level
 - Payroll Detail
 - Payroll Journal Entries
 - Journal Summary
 - Journal Entries
 - o **Specific sheets from this workbook** – will download direct “screenshots” of all the views in the tool. Therefore, you will not be able to see any projects that are hidden/you must scroll down to.
- Can also adjusting **Scaling, Paper Size, and Orientation**