BUD-27 Run Budget Dashboards

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to run budget dashboards in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to run the NC Budget to Actual Dashboard – Interactive Detail report and Summary report that compares the budget and actual costs to analyze variances. Budget dashboards can be used to drill down details from summary balances to detailed activity and budget transactions.

Run Budget Dashboards

To run Budget Dashboards in NCFS, please follow the steps below. There are 12 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Budgetary Control** tab and click the **NC Budget to Actual Dashboard** app.

Image

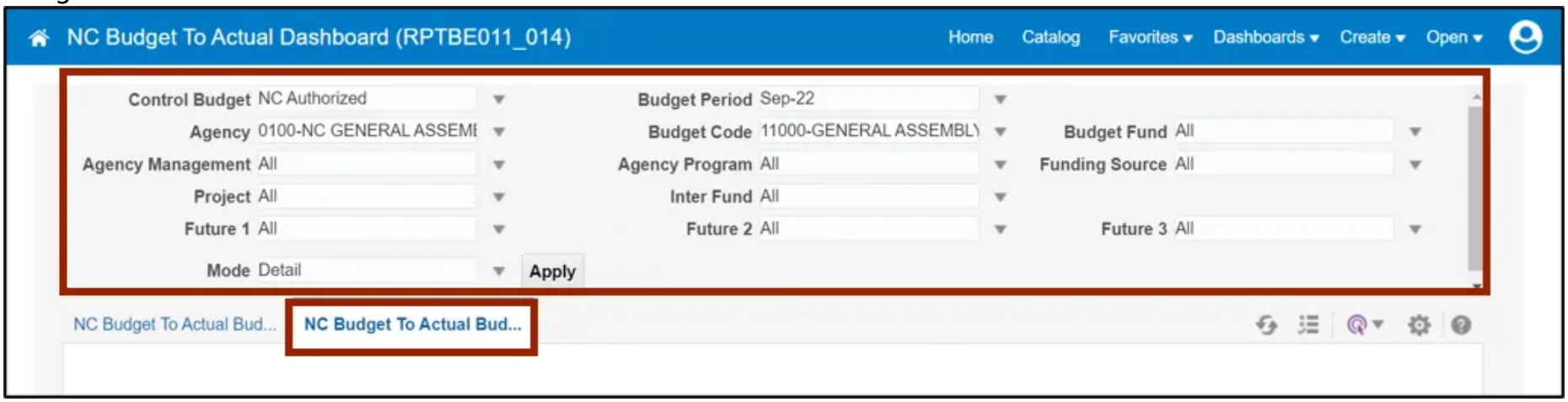


Step 3. The **NC Budget to Actual Dashboard (RPTBE011_014)** page opens. Click the **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** tab and select the appropriate choices for all the fields from their respective drop-down choice list.

In this example, we choose:

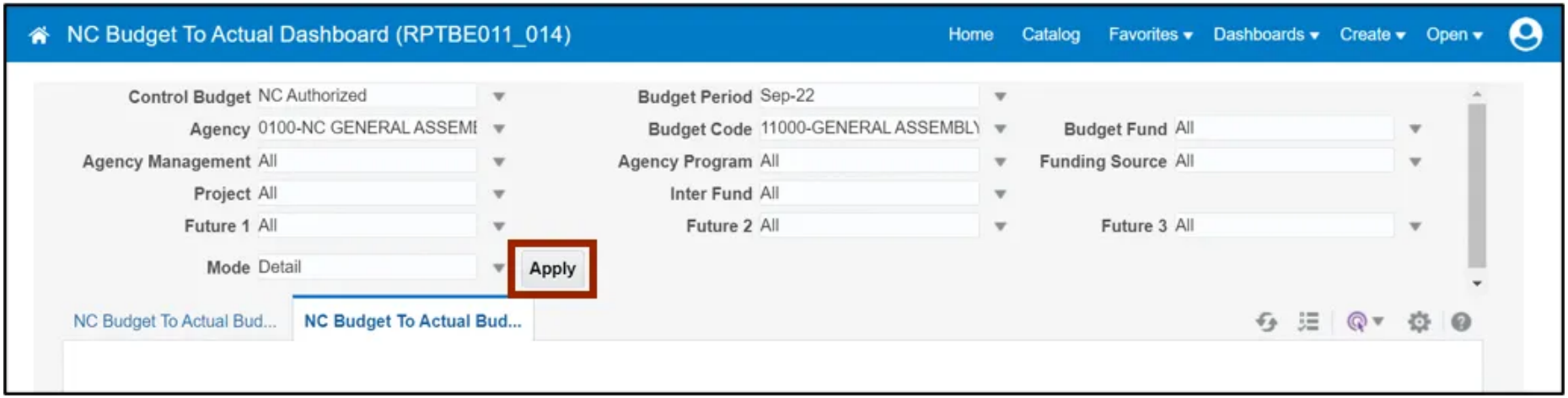
- ***Control Budget*: NC Authorized**
- ***Budget Period*: Sep-22**
- ***Agency*: 0100-NC GENERAL ASSEMBLY**
- ***Budget Code*: 11000-GENERAL ASSEMBLY-GENERAL**
- ***Budget Fund, Agency Management, Agency Program, Funding Source, Project, Inter Fund, Future 1, Future 2, Future 3*: All**
- Mode: **Detail.** Note: Selecting the **Detail** mode is **mandatory**.

Image



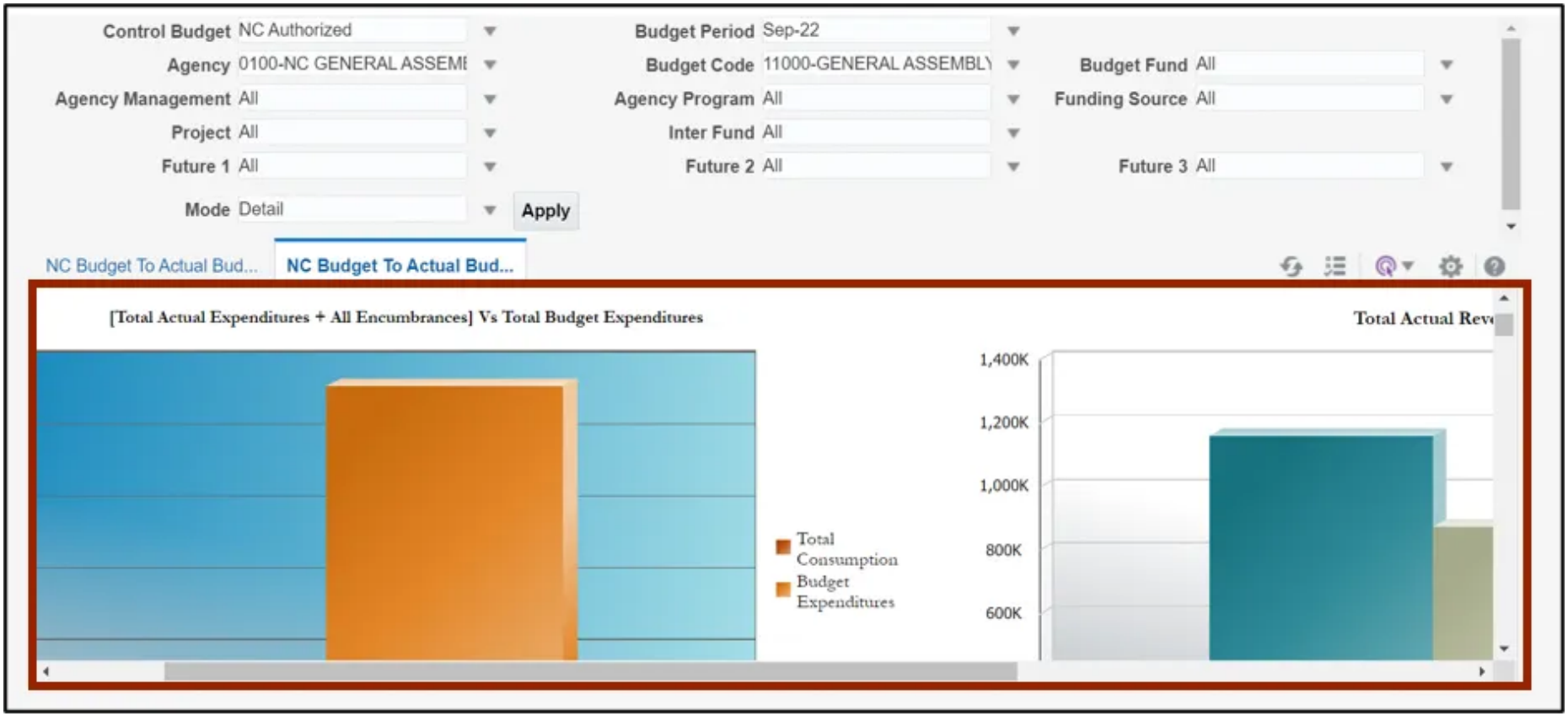
Step 4. Click the **Apply** button.

Image



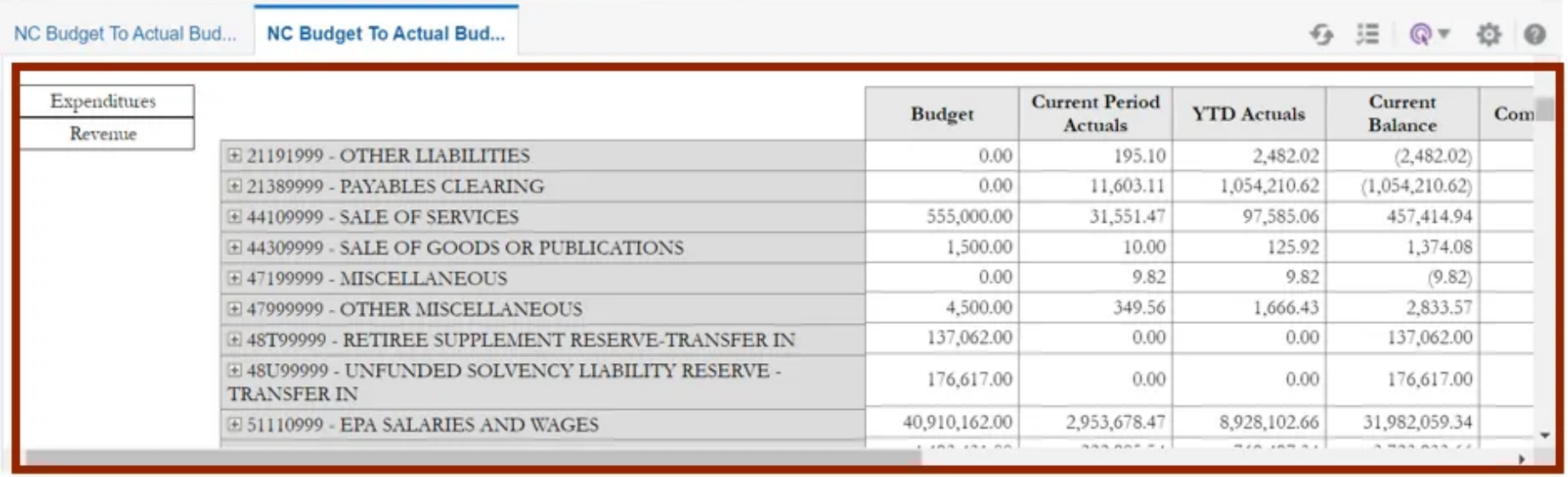
Step 5. The **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** dashboard is generated.

Image



Step 6. In the **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** dashboard, scroll down to validate the data elements and check their interactivity by clicking on the + sign next to the budget account or you can toggle between Expenditure and Revenue account.

Image



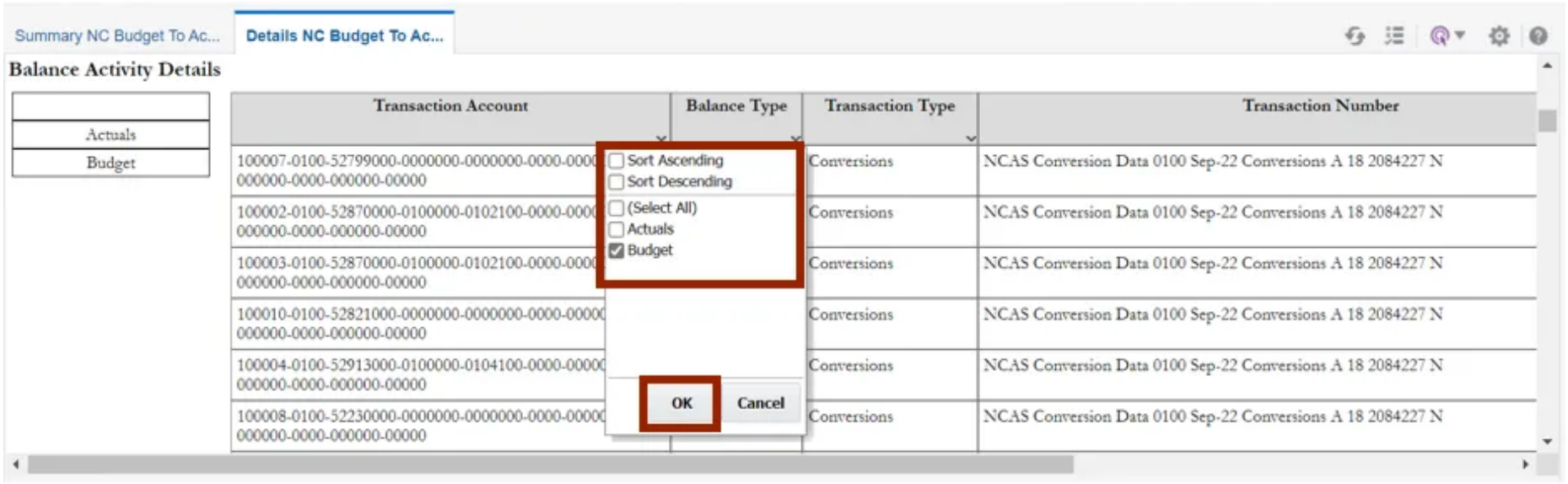
	Budget	Current Period Actuals	YTD Actuals	Current Balance	Com
⊞ 21191999 - OTHER LIABILITIES	0.00	195.10	2,482.02	(2,482.02)	
⊞ 21389999 - PAYABLES CLEARING	0.00	11,603.11	1,054,210.62	(1,054,210.62)	
⊞ 44109999 - SALE OF SERVICES	555,000.00	31,551.47	97,585.06	457,414.94	
⊞ 44309999 - SALE OF GOODS OR PUBLICATIONS	1,500.00	10.00	125.92	1,374.08	
⊞ 47199999 - MISCELLANEOUS	0.00	9.82	9.82	(9.82)	
⊞ 47999999 - OTHER MISCELLANEOUS	4,500.00	349.56	1,666.43	2,833.57	
⊞ 48T99999 - RETIREE SUPPLEMENT RESERVE-TRANSFER IN	137,062.00	0.00	0.00	137,062.00	
⊞ 48U99999 - UNFUNDED SOLVENCY LIABILITY RESERVE - TRANSFER IN	176,617.00	0.00	0.00	176,617.00	
⊞ 51110999 - EPA SALARIES AND WAGES	40,910,162.00	2,953,678.47	8,928,102.66	31,982,059.34	

Step 7. Toggle between the available data elements to view the desired output.

In this example, we click the drop-down for **Balance Type** and choose the **Budget** option in **Balance Activity Details** section.

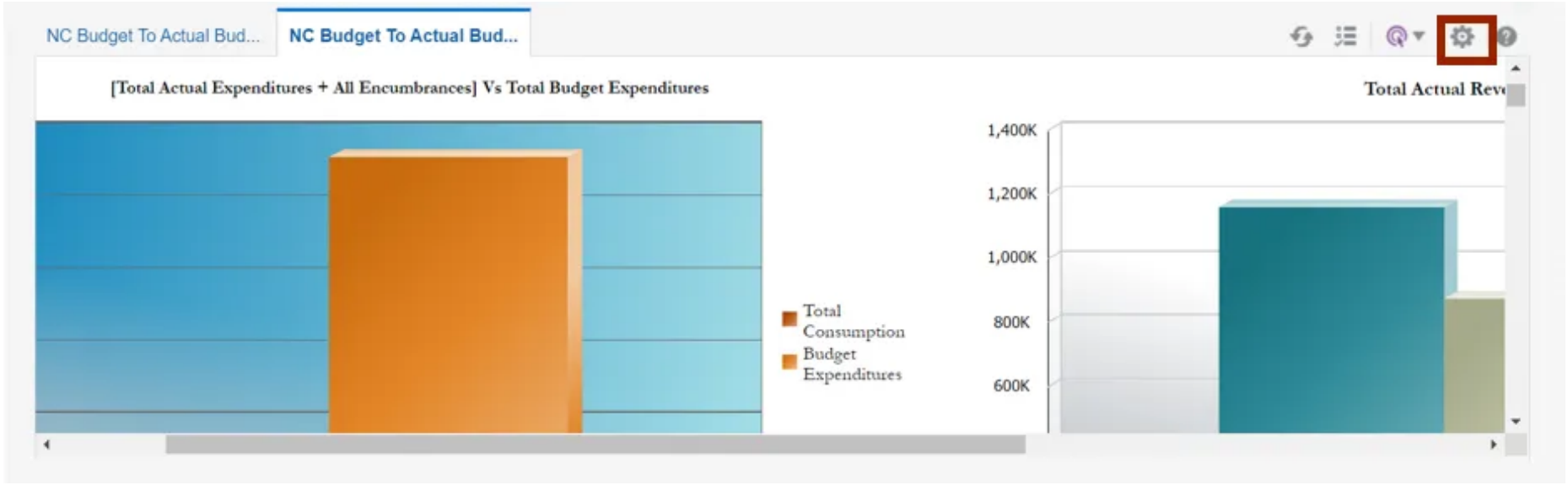
Note: By default, all the options are selected. Deselect the options not required and click the **OK** button.

Image



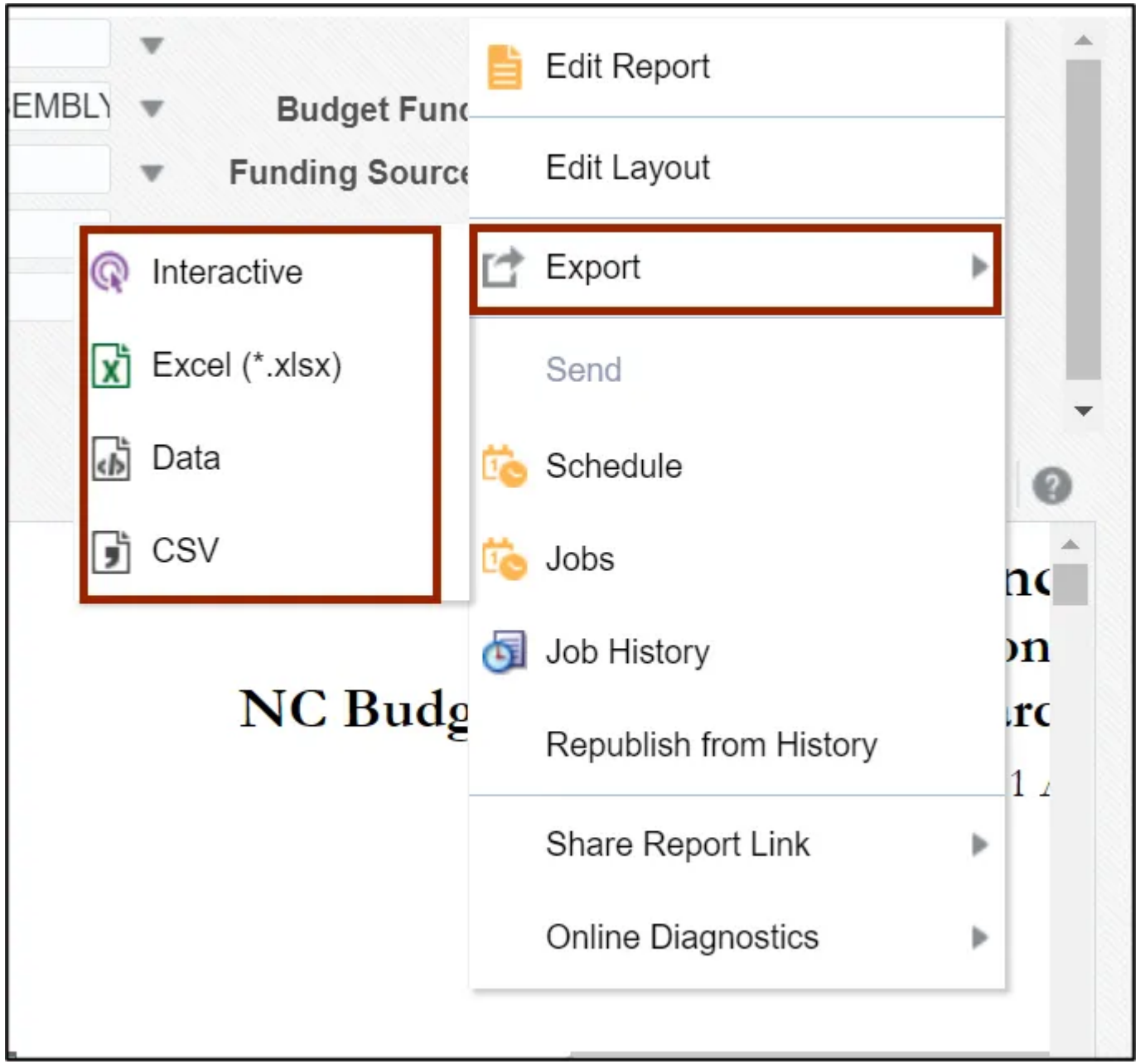
Step 8. Click the **Actions** icon.

Image



Step 9. On the **Actions** pane, click the **Export** option and select the required format to export the report. The Detail report is exported.

Image

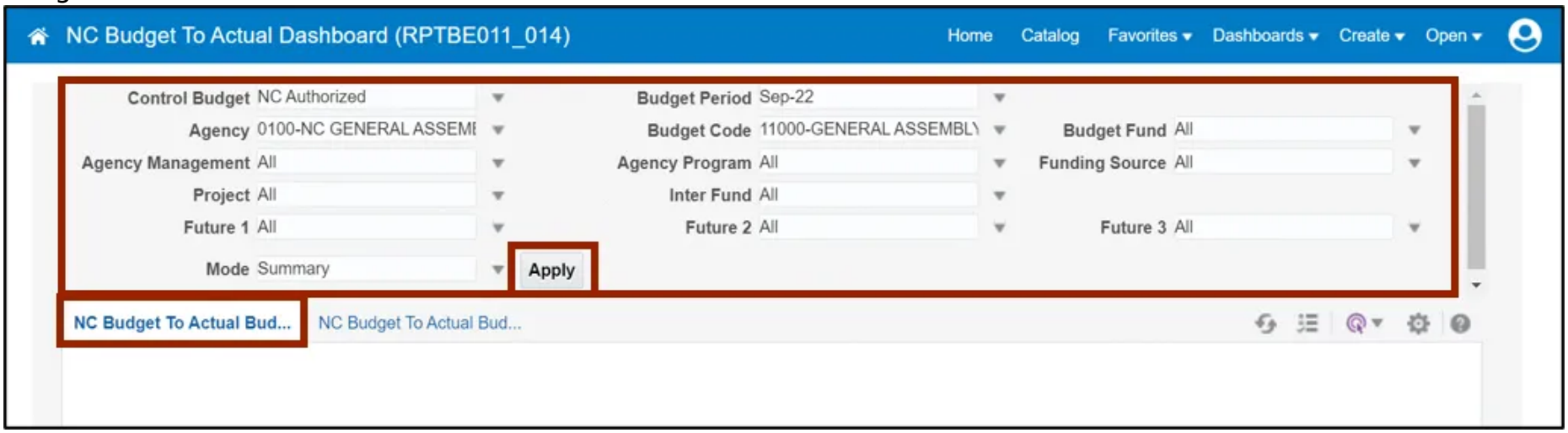

Edit Report
Edit Layout
Export
Send
Schedule
Jobs
Job History
Republish from History
Share Report Link
Online Diagnostics
Interactive
Excel (*.xlsx)
Data
CSV
Budget Func
Funding Source
NC Budg

Step 10. On the **NC Budget to Actual Dashboard (RPTBE011_014)** page, click the **NC Budget to Actual Budgetary Summary Dashboard_RPTBE011_014** tab. Select the applicable choices for all the fields from their respective drop-down choice list and click the **Apply** button.

In this example, we choose:

- ***Control Budget*: NC Authorized**
- ***Budget Period*: Sep-22**
- ***Agency*: 0100-NC GENERAL ASSEMBLY**
- ***Budget Code*: 11000-GENERAL ASSEMBLY-GENERAL**
- ***Budget Fund, Agency Management, Agency Program, Funding Source, Project, Inter Fund, Future 1, Future 2, Future 3*: All**
- Mode: **Summary.** Note: Selecting the **Summary** mode is **mandatory**.

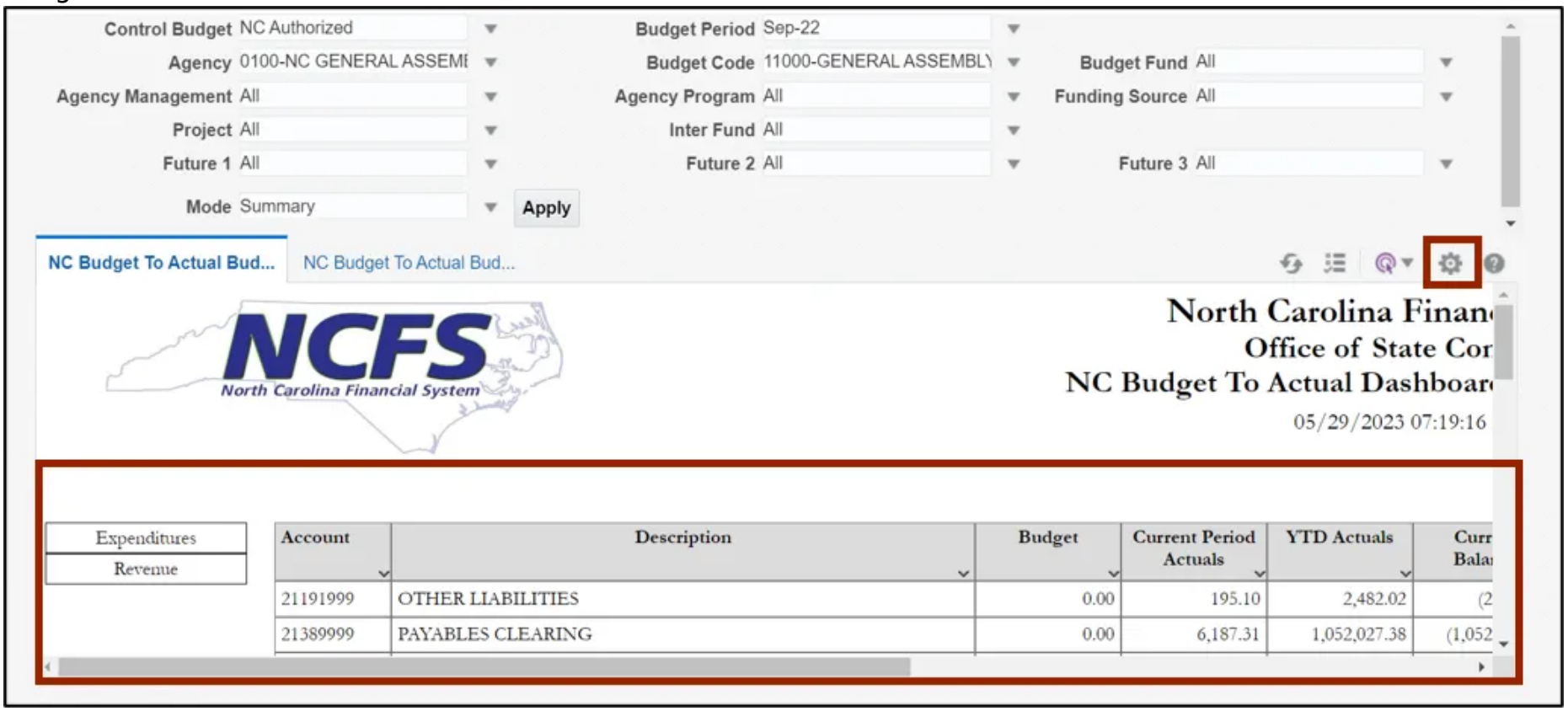
Image



Step 11. The **NC Budget to Actual Budgetary Summary Dashboard_RPTBE011_014** report is generated. In the **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** report, validate the data elements

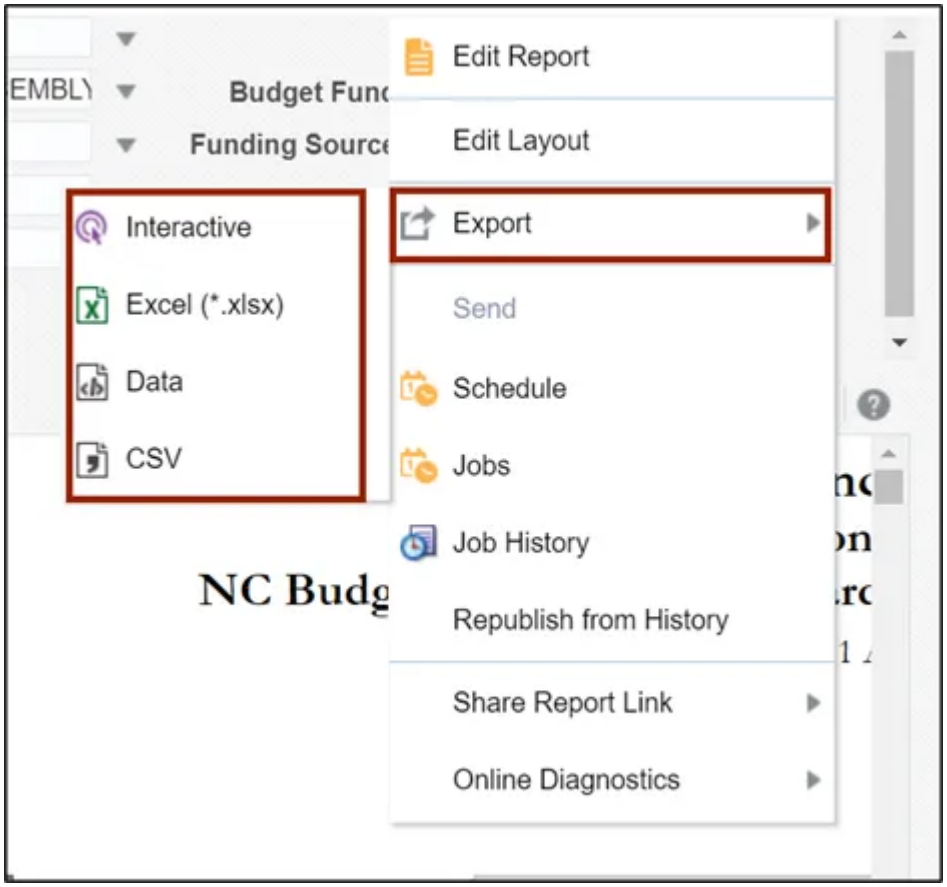
in the report and on the top right corner of the dashboard, click the **Actions** icon.

Image



Step 12. On the **Actions** pane, click the **Export** option and select the desired format to export the report. The Budget Summary report is exported.

Image



Wrap-Up

Run the NC Budget to Actual Dashboard – Interactive Detail report and Summary report that compares budget and actual costs to analyze variances. Budget dashboards can be used to drill down details from summary balances to detailed activity and budget transactions.

Additional Resources

- Web-Based Training (WBT)
  - BU001: Budget Inquiry

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