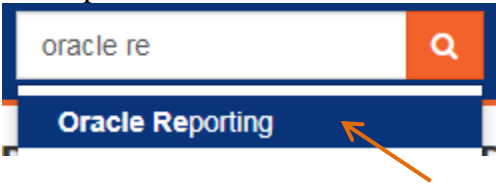
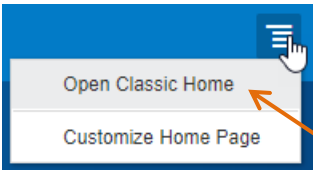




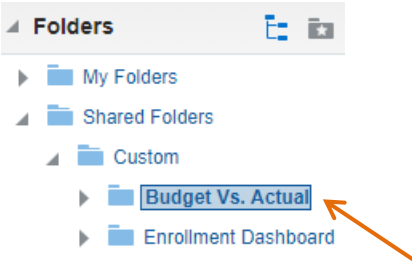
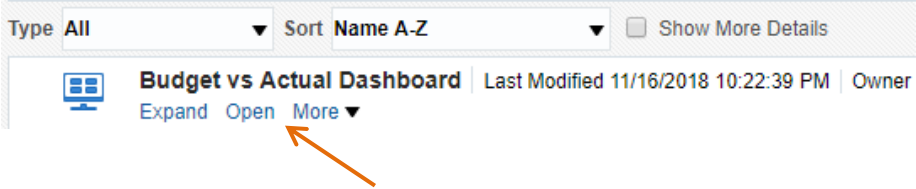
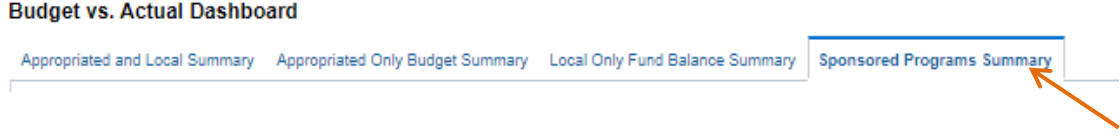

Running the Budget vs Actual Dashboard for Sponsored Programs – Oracle Reporting

Purpose: This report may be used to monitor sponsored program activities at any combination of Awards, Projects, Colleges, Departments and/or Principal Investigators. This allows visibility to the actual and committed totals in the financial system along with the established budget on the sponsored program.

Note: The report will not be available daily from 12:35 AM to 7:30 AM for data refresh.

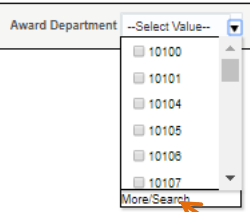
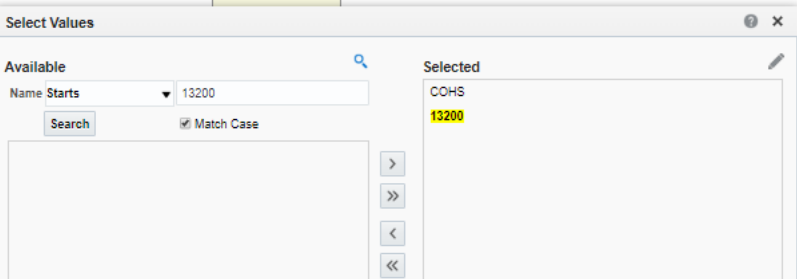

Step	Action
1.	<p>Begin by searching for Oracle Reporting from my.BoiseState.edu and Selecting from the dropdown.</p>  <p>ProTip! →From the dropdown under your name, click on Edit Employee Services →Search for Oracle Reporting, then click Add</p> <p>Profile:</p> <ul style="list-style-type: none"> LOG OUT MYBOISESTATE HELP CHANGE PASSWORD SECURITY <hr/> <p>EMPLOYEE Services:</p> <ul style="list-style-type: none"> EDIT EMPLOYEE SERVICES <p>Search Resources</p> <input type="text" value="Oracle Reporting"/> <hr/> <p> Oracle Reporting - Oracle reporting for Boise State University. + Add</p> <p><i>This will now always be available under Employee Services.</i></p>
2.	<p>From the Oracle Reporting Home Page, in the upper right-hand corner click the Page Menu icon and Select Open Classic Home.</p> 



Step	Action
3.	<p>Click Catalog near the top of the page.</p> <p>Navigate to Shared Folders / Custom / Budget Vs. Actual by using the chevrons to open each folder. Budget Vs. Actuals should be highlighted as indicated below.</p> 
4.	<p>Ensure Type is “All” and Select Open under Budget vs Actual Dashboard.</p> 
5.	<p>Select Sponsored Program Summary tab.</p> <p>Budget vs. Actual Dashboard</p> 
6.	<p>Input your parameters and click Apply.</p>  <p>ProTip!</p> <ul style="list-style-type: none"> →The Award Department is the department which was identified in the award →The Award PI is the one named in the award document and does not include co-PI assignments




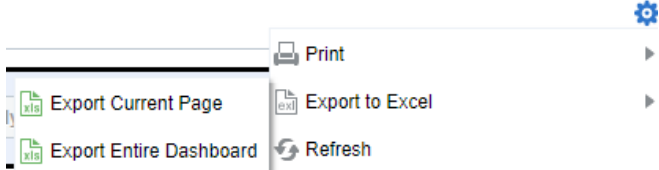

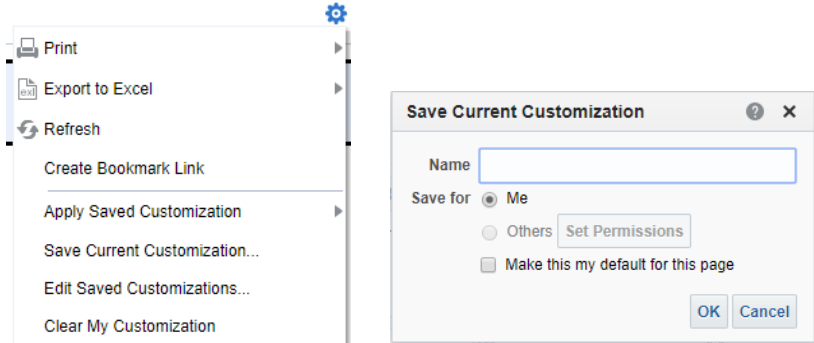
Step	Action
7.	<p>Award Department: The department which was identified in the award, or the subsequent hierarchies it could fall into. Hierarchies may be used to view groups of related segment values, for more information reference Hierarchies for Reporting.</p> <p>Award Number: Represented by the 6 digit award number from Office of Sponsored Programs.</p> <p>Award PI: Represented the Principal Investigator on the award, displayed as ‘last name, first name’.</p> <p>Project Number: Represented by the 10 digit project value.</p> <p>Award Status: This defaults to active award status; the descriptions of each status are below:</p> <ul style="list-style-type: none">• Active• Expired• Closed <p>Project Status: This defaults to approved project status; the description of each status is included below:</p> <ul style="list-style-type: none">• Approved• Closed <p>ProTips!</p> <p>→ You may select more than one parameter, as necessary.</p> <p>→ Search parameters will carry over to the different tabs.</p>

Step	Action				
8.	<p>Search for a more options on the parameters by selecting the dropdown arrow and clicking More/Search</p>  <p>Search Tips: Select the operator Starts, Contains, Ends, or is Like. Uncheck Match Case Highlight value(s) and add/remove values using the > and <. Using the double arrow (>>) will move ALL values in or out of the selected section.</p> 				
9.	<p>Project BvA by Award section will dynamically show the Award and Project count for the search results.</p> <p style="text-align: center;"><u>Project BvA By Award</u></p> <table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 50%; border: none;">Award Count</td> <td style="text-align: center; width: 50%; border: none;">Project Count</td> </tr> <tr> <td style="text-align: center; border: none;">57</td> <td style="text-align: center; border: none;">86</td> </tr> </table>	Award Count	Project Count	57	86
Award Count	Project Count				
57	86				
10.	<p>The red and yellow boxes display the total number of projects and budget categories overspent based on the search criteria. Use the check box under each box and click Apply to filter the search results to only show the over budget items:</p> 				



Step	Action																																																
11.	<p>To review actual transaction details for the <u>budget category</u>, click on an amount listed for the budget category in the table and select Actual for Budget Category.</p> <table border="1"> <thead> <tr> <th>Budget Category</th> <th>Budget</th> <th>Actual</th> <th>Commitment</th> <th>Available Amount</th> <th>Budget Remainder</th> </tr> </thead> <tbody> <tr> <td>Salary</td> <td>526,277.75</td> <td>526,042.93</td> <td></td> <td>234.82</td> <td></td> </tr> <tr> <td>Fringe</td> <td>238,636.38</td> <td>233,687.72</td> <td></td> <td>4,948.66</td> <td></td> </tr> <tr> <td>Other Expense</td> <td>254,122.56</td> <td>200,209.54</td> <td></td> <td>53,913.02</td> <td></td> </tr> <tr> <td>Travel</td> <td>55,100.00</td> <td>44,207.66</td> <td></td> <td>10,892.34</td> <td></td> </tr> <tr> <td>Subrecipients >25k</td> <td>54,229.95</td> <td>46,940.05</td> <td>7,290.18</td> <td>-0.28</td> <td></td> </tr> <tr> <td>Subrecipients <25k</td> <td>29,419.25</td> <td>25,000.00</td> <td></td> <td>4,419.25</td> <td></td> </tr> <tr> <td>F&A</td> <td>430,386.88</td> <td>401,495.62</td> <td>2,925.00</td> <td>25,966.26</td> <td></td> </tr> </tbody> </table> <p>ProTip! To return to the previous page when viewing drill detail, click Return at the bottom of the table.</p> <p>Return - Refresh</p>	Budget Category	Budget	Actual	Commitment	Available Amount	Budget Remainder	Salary	526,277.75	526,042.93		234.82		Fringe	238,636.38	233,687.72		4,948.66		Other Expense	254,122.56	200,209.54		53,913.02		Travel	55,100.00	44,207.66		10,892.34		Subrecipients >25k	54,229.95	46,940.05	7,290.18	-0.28		Subrecipients <25k	29,419.25	25,000.00		4,419.25		F&A	430,386.88	401,495.62	2,925.00	25,966.26	
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Step	Action
14.	<p>The Budget vs Actual report may be exported to Excel by selecting the gear  in the upper right hand corner, Export to Excel, and choosing either Current Page or Entire Dashboard.</p> 
15.	<p>Search Parameters may be saved by entering search values, selecting the gear  in the upper right hand corner, select Save Current Customization, enter a Name for the search, and click OK.</p> 
16.	End of Procedure.