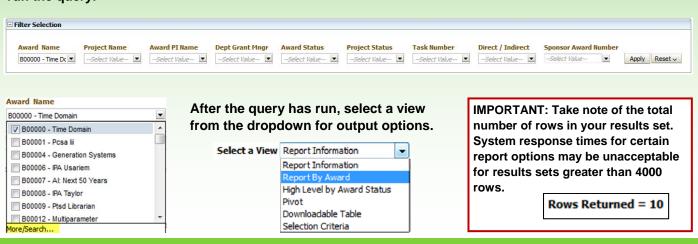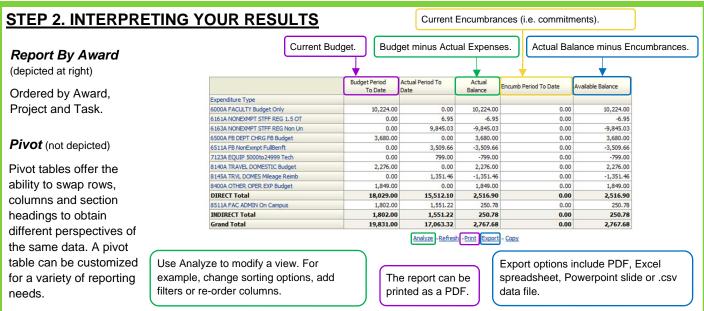# OGA Reports in IRA: Budget vs. Actuals

This report summarizes budgeted amounts versus expenditures and encumbrances, by award, project, task and expenditure type. It includes budget, actual and encumbrance amounts.

CSP Training Aids

BUDGET VS. ACTUALS

STEP 1. SETTING UP YOUR QUERY

Utilize the dropdown arrow on one or more filters to specify how you want the data to be filtered. The Award Name filter is preset to "B00000" to avoid running an unlimited query. If a desired filter value is not available in the dropdown, then click "More/Search…" to view additional available values. Click Apply to run the query.

Filter Selection

Award Name	Project Name	Award PI Name	Dept Grant Mngr	Award Status	Project Status	Task Number	Direct / Indirect	Sponsor Award Number		
B00000 - Time Do	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	--Select Value--	Apply	Reset

Award Name

B00000 - Time Domain

- ☑ B00000 - Time Domain
- ☐ B00001 - Pcsa lii
- ☐ B00004 - Generation Systems
- ☐ B00006 - IPA Usariem
- ☐ B00007 - AI: Next 50 Years
- ☐ B00008 - IPA Taylor
- ☐ B00009 - Ptsd Librarian
- ☐ B00012 - Multiparameter

More/Search…

After the query has run, select a view from the dropdown for output options.

Select a View: Report Information

- Report Information
- Report By Award
- High Level by Award Status
- Pivot
- Downloadable Table
- Selection Criteria

IMPORTANT: Take note of the total number of rows in your results set. System response times for certain report options may be unacceptable for results sets greater than 4000 rows.

Rows Returned = 10

STEP 2. INTERPRETING YOUR RESULTS

Current Encumbrances (i.e. commitments).

Current Budget.

Budget minus Actual Expenses.

Actual Balance minus Encumbrances.

Report By Award
(depicted at right)

Ordered by Award, Project and Task.

Pivot (not depicted)

Pivot tables offer the ability to swap rows, columns and section headings to obtain different perspectives of the same data. A pivot table can be customized for a variety of reporting needs.

Expenditure Type	Budget Period To Date	Actual Period To Date	Actual Balance	Encumb Period To Date	Available Balance
6000A FACULTY Budget Only	10,224.00	0.00	10,224.00	0.00	10,224.00
6161A NONEXMPT STFF REG 1.5 OT	0.00	6.95	-6.95	0.00	-6.95
6163A NONEXMPT STFF REG Non Un	0.00	9,845.03	-9,845.03	0.00	-9,845.03
6500A FB DEPT CHRG FB Budget	3,680.00	0.00	3,680.00	0.00	3,680.00
6511A FB NonExmpt FullBenft	0.00	3,509.66	-3,509.66	0.00	-3,509.66
7123A EQUIP 5000to24999 Tech	0.00	799.00	-799.00	0.00	-799.00
8140A TRAVEL DOMESTIC Budget	2,276.00	0.00	2,276.00	0.00	2,276.00
8145A TRVL DOMES Mileage Reimb	0.00	1,351.46	-1,351.46	0.00	-1,351.46
8400A OTHER OPER EXP Budget	1,849.00	0.00	1,849.00	0.00	1,849.00
DIRECT Total	**18,029.00**	**15,512.10**	**2,516.90**	**0.00**	**2,516.90**
8511A FAC ADMIN On Campus	1,802.00	1,551.22	250.78	0.00	250.78
INDIRECT Total	**1,802.00**	**1,551.22**	**250.78**	**0.00**	**250.78**
Grand Total	**19,831.00**	**17,063.32**	**2,767.68**	**0.00**	**2,767.68**

Analyze - Refresh - Print - Export - Copy

Use Analyze to modify a view. For example, change sorting options, add filters or re-order columns.

The report can be printed as a PDF.

Export options include PDF, Excel spreadsheet, Powerpoint slide or .csv data file.

STEP 3. SAVING YOUR QUERY

To save your customized query, click Page Options then Save Current Customization. Next, name the report.

To retrieve your saved query, click Page Options then Apply Saved Customization. Next, select the appropriate report.

- Print
- Refresh
- Create Bookmark Link
- Create Prompted Link
- Apply Saved Customization
- Save Current Customization…
- Edit Saved Customizations

"Page Options"

- Print
- Refresh
- Create Bookmark Link
- Create Prompted Link
- BVA Project 1 Apply Saved Customization
- Save Current Customization…
- Edit Saved Customizations…
- Clear My Customization