



Budget to Date by Division/College Report 2023

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Important Notes to Using & Reviewing Your Results

Notes

Data Population

This report is populated with data from the PS_Ledger_KK.

o Items without a Budgeted Amount

All Actuals will print to the report regardless of the corresponding Budget Account possessing a dollar amount or zero entry.

Actuals

Actuals are from approved and posted transactions.



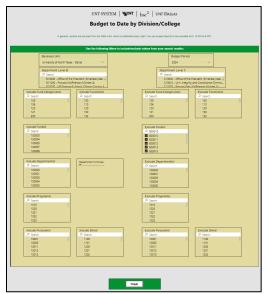
Locate Report

- From the Budget & Planning Reporting Page, locate "Budget to Date by Division College".
- 2. Login to Microsoft Power BI to run the report.

Report Setup- Prompt Pages

Report Setup - Prompt Page

All initial **Landing Pages** for reports in Microsoft Power BI will Appear similar in format. You will have a set of filtering choices based on the source's available data.



REPORT FOCUS FILTERS AND CHARTSTRING INCLUSIONS/EXCLUSIONS

1. Select your parameter choices. (No parameters within this report are required).

Remember that prompts filter your data. By entering values into the prompts you narrow the result sets. Start off by casting a wide net by only using one prompt. You can always rerun the report with additional prompt to narrow the results as needed.

Business Unit	Default will pull "All Units" or you may use the Dropdown to select one particular unit by which to filter the report. Hover over the top left corner within the filter to clear selections (eraser icon).
Budget Period	The budget year defaults to the current operating year. You can use the dropdown to change the year.
Department Level B/ Department Level C	You can Search by Department Level B or C.
Fund Category	Include/Exclude multiple Fund Cats using checkbox filter.
Fund	Include/Exclude multiple Funds using checkbox filter.
Function	Include/Exclude multiple Functions using checkbox filter.
Department	Include/Exclude multiple Department IDs using checkbox filter. Your selections appear in the choices box.
Account	Include/Exclude multiple Accounts using checkbox filter.



Guide Budget to Date by Division/College Report 2023

Program	Include/Exclude multiple Programs using the checkbox filter.
Purpose	Include/Exclude multiple Purposes using the checkbox filter.
Site	Include/Exclude multiple Sites using the checkbox filter.

2. When you are satisfied with your choices, **click** the **Finish Button** to run the report.

^{*}If you need to make changes or want to check your filters, you can click the **Back to Prompts** Button at any time to review and click the Finish Button from any point without having to re-enter your information.



Guide

(743,278.42)

17,251,266.52

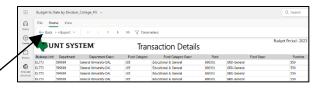
Budget to Date by Division/College Report 2023

Budget to Date by Division_College_PG 6 Report Results Subscribe to report \oplus Budget to Date by Divisio Report Results 599996 - UNTD Campus Administration (Stowe Amber) 830001 - Designated Tuition 48.676.00 599998 - Caruth Police Institute(Bradford Jr., Arthur Dean) 800001 - GRD-General 207,420.00 REPORT FEATURES 599998 - Caruth Police Institute(Bradford Jr., Arthur Dean) 830001 - Designated Tuition 150,000.00 880054 - CPI Police Dept FFF 599998 - Caruth Police Institute(Bradford Jr., Arthur Dean) 177,422.53 880055 - CPI Individual FFF Results are grouped by **Department – Fund**, 599998 - Caruth Police Institute(Bradford Jr.,Arthur Dean) 100,221.69 599999 - General University-DAL(Bradford Jr.,Arthur Dean) 800001 - GRD-General 1,115,131.84 599999 - General University-DAL(Bradford Jr.,Arthur Dean) indicated by the Underlined Title Bar. (70,760.99) 599999 - General University-DAL(Bradford Jr., Arthur Dean) 805038 - State Approp-HEF 1.482.066.98 Positive amounts will be shown in blue. 7,824,982.00 599999 - General University-DAL(Bradford Jr., Arthur Dean) 805090 - State Approp-CSEM-Additional 0.00 599999 - General University-DAL(Bradford Jr., Arthur Dean) 807006 - State Funds-Hazelwood 0.00 ,© 599999 - General University-DAL(Bradford Jr., Arthur Dean) 807044 - State Funds-THECB CRU 84,501.25 599999 - General University-DAL(Bradford Jr., Arthur Dean) 807113 - State Funds-GEER Tx Grants (199,729.00) 599999 - General University-DAL(Bradford Jr., Arthur Dean) 810006 - Auxiliary- Events 0.00 599999 - General University-DAL(Bradford Jr., Arthur Dean) 830001 - Designated Tuition 5,576,729.09 599999 - General University-DAL(Bradford Jr., Arthur Dean) 830029 - Designated Oper-Central Alloc 38,298,60 830045 - HEERF Institutional Revenue 599999 - General University-DAL(Bradford Jr., Arthur Dean) 1,530,856.02 599999 - General University-DAL(Bradford Jr., Arthur Dean) 880002 - Student Service FFF (195,783,30) 599999 - General University-DAL(Bradford Jr., Arthur Dean) 880013 - Publications FFF 1.953.24 599999 - General University-DAL(Bradford Jr., Arthur Dean) 14,682.98 599999 - General University-DAL(Bradford Jr.,Arthur Dean) 880028 - Late Payment FFF 107,876.01

Overall - Total

DRILL-THROUGH OPTIONS

Clicking on any of the underlined dollar amounts will drill-through to the "FIN003 – Transaction Detail" report to view the detailed transactional line that makes up the chosen amount. This is opened within the original report (Budget to Date), so click on Back to return to Budget to Date.



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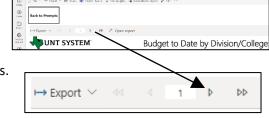
599999 - General University-DAL(Bradford Jr.,Arthur Dean)



Report Functionalities

LAYOUT OVERVIEW

- Report results are typically displayed in an interactive HTML on screen style.
- Based on your selections, if any, the report will only display results that match your initial filtering choices.
- Use the arrows to navigate between pages (if any).
- Use the double forward arrow to skip to the last page of Applied Parameters where you can review what your filtering choices were on the initial Prompt Page selections. Use the double back arrow to return to the first report page.



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If there is an error in your request or no results can be produced, you get a return message showing the
parameters you chose that produced these results. (See the <u>Error Results section</u> below for more information
or to troubleshoot.)

Exporting Your Report Results

Exporting Your Report Results

Below the Back to Prompts button on the report results page, you will see options to **Export** your results, as needed.

- XLS
- PDF
- CSV
- PPTX
- DOCX

EMAIL REPORT DIRECTLY

Click the **"Share"** symbol in the top toolbar to share the report link via Microsoft Outlook, Teams, or PowerPoint. Alternatively, you can copy the link

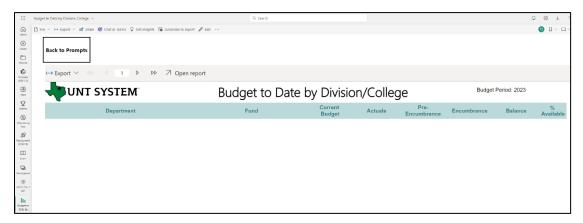
to your clipboard. If you choose to **Include your Changes**, your filters will be saved within the link you send to others.



Error Results

Run Report Error

When the requested filters result without a match for data, Power BI displays the following:



If you need to return to the prompts to adjust them, click the **Back to Prompts** button in the top left corner.

Error Results

Drill-Through Message or Error

When the requested filters via drill through result without a match for data, Power BI displays the following:

