Dashboard: Non-Sponsored Projects LTD Actuals Trend

What is the Non-Sponsored Projects LTD Actuals Trend?
The Non-Sponsored Projects LTD Actuals Trend provides a summary report of life to date (LTD) actuals by fiscal year for non-sponsored projects. This allows you to identify spending trends over the life of a project.

NOTE: This report does not include budget information, encumbrances, or budget to actual balances. See the Budget to Actual Reporting dashboard for non-sponsored project budget information.

When should I use the Non-Sponsored Projects LTD Actuals Trend?
Use this report if you want to see a summary of transactions on any NSP fund by fiscal year or total actuals for the life of the non-sponsored project.

TIP: Non-Sponsored Projects includes transactions with fund codes beginning with 2XXX, 3XXX, 4XXX, 6XXX, 7XXX, 8XXX, and 9XXX.

Where do I find this report in EBI?
1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards Menu in the upper right corner
3. In the FMS – Operational folder, click the Non-Sponsored Projects LTD Actuals Trend link.
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Selecting Prompts

1. Select an Operating Unit, Department, or Project.
2. If an entire Operating Unit or Department is needed, select a value in the Operating Unit or Department prompt. Otherwise, set it to “All Column Values” and select a Project.

   **Remember**, you can select multiple prompt values in a single prompt. For example, if you want to see results for three projects, select all three projects from the prompt menu and run the report.

3. Click Apply.

   **TIP**: The Project Effective Status prompt defaults for Active projects. To view results for Inactive projects, select “All Column Values” in this prompt.

   **NOTE**: To view Pediatrics Institute data on this report, you MUST choose “All Column Values” in the Project Effective Status prompt.
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Report View Options

There are four view options on the Non-Sponsored Projects LTD Actuals Trend that users can choose from. Views are available in the View Selector dropdown menu, which becomes visible after the report is run.

**NOTE:** The views with labor will only display labor details by employee, based on your labor security. If you do not have labor security for the prompted values, you will see salary and fringe aggregated at the account code level.

The default report view is the “Project LTD Fiscal Year Summary” view and displays the LTD actuals posted by project and account code details, summarized by fiscal year. This view displays labor data aggregated at the account code level.

The “Project LTD Fiscal Year Summary with Labor” view includes all of the information in the “Project LTD Fiscal Year Summary” view, but includes employee details for Labor Transactions.
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The “Project LTD Fiscal Year Detail” view is similar to the “Project LTD Fiscal Year Summary” view. It displays the LTD actuals posted by project and account code details, but summarizes at the accounting period for each fiscal year. This view also displays labor data aggregated at the account code level.

The “Project LTD Fiscal Year Detail with Labor” view includes all of the information in the “Project LTD Fiscal Year Detail” view, but includes employee details for Labor Transactions.

TIP: Need additional information? Try to customize any of these views by including columns that may be excluded. Right click on any column header and choose “Include Column” to see what additional data is available for this report.

More Information:

For additional assistance, please contact the Analytics & Reporting team via the Finance Support Center. Choose Emory Business Intelligence (EBI)/Reporting as your ticket category.