![Emory University | Enterprise Data Analytics and Strategic Support](logo)

Dashboard: Budget Transaction Detail Report

What is the Budget Transaction Detail Report dashboard?

The Budget Transaction Detail Report, also known as the BTDR, shows a detailed view of original budgets, adjustments, and transfers. Details include journal ID, journal date, and submitter.

When should I use the Budget Transaction Detail Report?

This report looks exclusively at budget transactions and does not include other transactions (revenues, expenses, or transfers). Use this report if you are specifically looking for budget entry details.

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 – Operations folder, click the Budget Transaction Detail Report link.
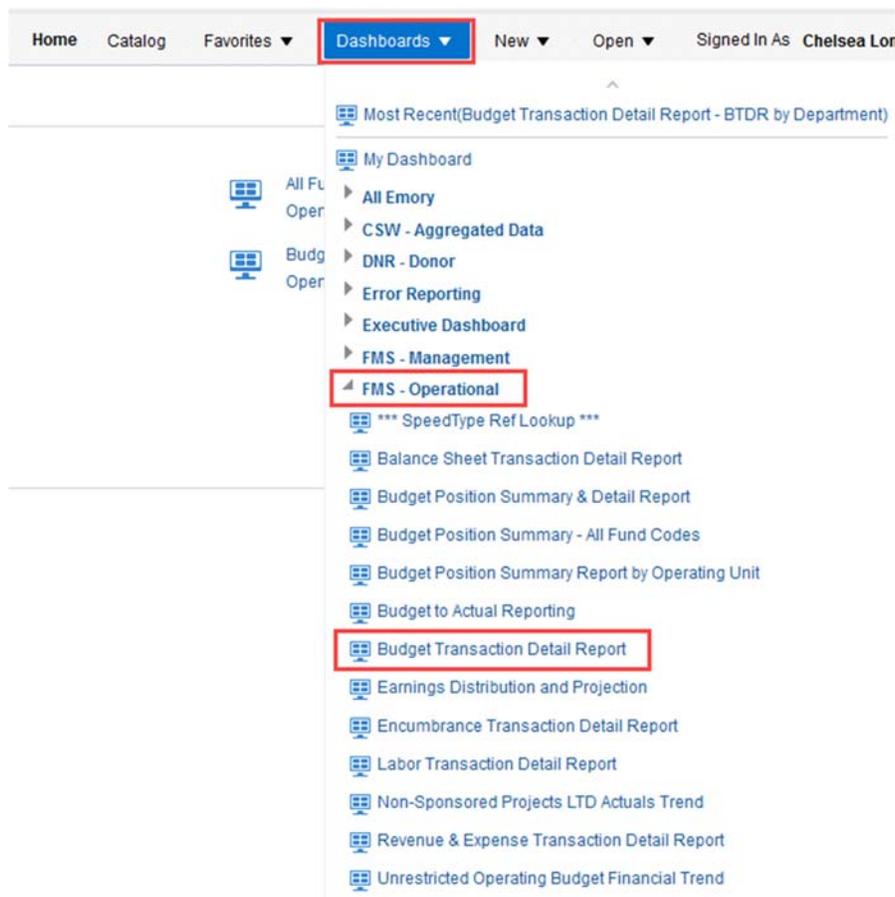
Understanding the Dashboard Pages

The dashboard is divided into four pages (or tabs): **BTDR by Department, BTDR by Award, BTDR by Project** and **BTDR by Principal Investigator**. The default page for the dashboard is the BTDR by Department page. Each page contains the same information, but organize the data columns differently.

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Budget Transaction Detail Report

BTDR by Department   BTDR by Award   BTDR by Project   BTDR by Principal Investiagator

BTDR by Department

The BTDR by Department page provides budget transaction details for the prompted values by Department.

Selecting Prompts:

1. Select your Reporting Begin Date and Reporting End Date.

2. Select the Fund Group(s). This is a required prompt, but the default selection is All Column Values.

3. Select an Operating Unit.

4. Select other prompt values as needed.

   TIP: When selecting prompt values for this report, remember it is a **transaction detail report**. This means that if you prompt on a wide range of data, such as an entire Operating Unit or multiple fiscal years, it may result in too much data. If you receive an error message, try reducing your prompts to include less data.

   NOTE: The Ledger prompt defaults to specific values, rather than All Column Values. It selects all budget ledgers except those with projected budget entries. Adjust the prompt selections here as needed.

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Budget Transaction Detail Report

* Reporting Begin Date
>= 09/01/2017

* Reporting End Date
<= 12/31/2017

* Fund Group
(All Column Values) ▼

Fund
(All Column Values) ▼

Business Unit
(All Column Values) ▼

* Operating Unit
16000- Goizueta Business Scho ▼

Department
(All Column Values) ▼

Principal Investigator
(All Column Values) ▼

Award
(All Column Values) ▼

Project
(All Column Values) ▼

Project Activity
(All Column Values) ▼

Project Status
(All Column Values) ▼

Account Group
(All Column Values) ▼

Account
(All Column Values) ▼

Ledger
CAPC_BUD- CC Capital Child B ▼

Apply   Reset ▼

* Indicates Required Prompt

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View Options:

Once the report has run and results display, there are two view options available in the View Selector.

1. **BTDR by Department** - this view shows budget transaction details by Business Unit, Operating Unit, Department, with additional chartfield and detail columns.

2. **Department Table View** - this view shows the budget transaction details in a table view, meant for exporting to Excel or CSV. It includes additional columns, but not all of the columns that are available to include.

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TIP: Don't see a column that you need? Check to see what columns are available to include by right clicking on any column header and navigating to Include Column.

BTDR by Award

The BTDR by Award page provides budget transaction details for the prompted values by Award.

View Options:

1. **BTDR by Award** - this view shows budget transaction details by Award, Project, and Principal Investigator, with additional chartfield and detail columns.

2. **Award Table View -** this view shows the budget transaction details in a table view, meant for exporting to Excel or CSV. It includes additional columns, but not all of the columns that are available to include.

Dashboard: Budget Transaction Detail Report

BTDR by Project

The BTDR by Project page provides budget transaction details for the prompted values by Project.

View Options:

1. **BTDR by Project** - this view shows budget transaction details by Project, Award, and Principal Investigator, with additional chartfield and detail columns.

2. **Project Table View -** this view shows the budget transaction details in a table view, meant for exporting to Excel or CSV. It includes additional columns, but not all of the columns that are available to include.

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BTDR by Principal Investigator

The BTDR by Principal Investigator page provides budget transaction details for the prompted values by Principal Investigator.

View Options:

1. **BTDR by PI** - this view shows budget transaction details by Principal Investigator, Award, and Project, with additional chartfield and detail columns.

2. **PI Table View -** this view shows the budget transaction details in a table view, meant for exporting to Excel or CSV. It includes additional columns, but not all of the columns that are available to include.

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.