Dashboard: Budget to Actual Reporting – Multi-Year Trend Reports

What are the Multi-Year Trend Reports?
The Multi-Year Trend Reports, located on the Budget to Actual Reporting dashboard, provide a report of monthly actuals on all fiscal years for unrestricted operating budgets and non-sponsored projects. This allows you to compare transaction trends by accounting period across fiscal years.

When should I use the Multi-Year Trend Reports?
Use this report if you want to see how much has been spent on any UOB or NSP fund by accounting period across fiscal years.

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 Budget to Actual Reporting link.
Dashboard: Budget to Actual Reporting – Multi-Year Trend Reports

Understanding the Dashboard Pages

The Budget to Actual Reporting dashboard is divided into four pages (or tabs). Navigate to the Multi-Year Trend Reports page to view the Unrestricted Operating Budget Multi-FY Trend or the Non-Sponsored Projects Multi-FY Trend.

TIP: UOB includes transactions with fund codes beginning with 1XXX. NSP includes transactions with fund codes beginning with 2XXX, 3XXX, 4XXX, 6XXX, 7XXX, 8XXX, and 9XXX.

Unrestricted Operating Budget Multi-FY Trend

This is the default page on the dashboard. It displays a pivot table that includes transaction totals by account category and accounting period. This page shows details for all fiscal years, up to the prompted fiscal year and accounting period.

Selecting Prompts:

1. Select a Fiscal Year and Accounting Period. The report will default to the current Fiscal Year and the last closed Accounting Period.
2. If an entire Operating Unit is needed, select a value in the Operating Unit prompt. Otherwise, set it to “All Column Values” and select a Department.

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

3. Click Apply.
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**Viewing Results**
A pivot table with results will display by Account Group, Account Category, and Fiscal Year. For each Fiscal Year row, you will see the budget loaded (if any), transactions that have posted, and the Budget Available for the specific row.

**TIP:** This page does not include Encumbrances or Labor Detail by Employee.

Please review the note at the top of the results section, as the signs are different when compared to other pages on the Budget to Actual Reporting dashboard.

**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.
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Non-Sponsored Projects Multi-Year Trend

Similar to the Unrestricted Operating Budget Multi-Year Trend, this page will display a pivot table that includes transaction totals by account category and accounting period. This page shows details for all fiscal years, up to the prompted fiscal year and accounting period.

Selecting Prompts:

1. Select a Fiscal Year and Accounting Period. The report will default to the current Fiscal Year and the last closed Accounting Period.

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

3. Select a Department or Division to view all Projects within those areas OR choose All Column Values and prompt on a specific project or projects in the Project prompt.

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

4. Click Apply.

   **TIP:** The Project Effective Status prompt defaults to “Active.” Use this prompt if you also wish to see inactive project details.
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**Viewing Results**
A pivot table with results will display by Project, Account Group, Account Category, and Fiscal Year. For each Fiscal Year row, you will see the budget loaded (if any), transactions that have posted, and the Budget Available for the specific row.

**TIP:** This page does not include Encumbrances or Labor Detail by Employee.

Please review the note at the top of the results section, as the signs are different when compared to other pages on the Budget to Actual Reporting dashboard.

**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.