SPONSORED SUMMARY – BUDGET, COST, AND ENCUMBRANCE BY EXPENDITURE TYPE

OVERVIEW

This dashboard summarizes a Sponsored Project’s Budget, Cost, and Encumbrance by Expenditure Type with current balances both with and without encumbrances. Users can query by Project Number, Award Number, Project Organization, and Principal Investigator. They can also filter by the Accounting Date To parameter in order to get inception-to-date project balances as of the desired date. It is intended to provide data equivalent to that of the PJ 071 report.

The dashboard includes:

1. Parameters
2. A Project Listing with basic project/award attributes of the queried projects
3. A Summary Report with balances by expenditure type
4. A Budget vs Cost bar graph
5. A pie chart showing costs by expenditure category
QUERY LOCATION

Tools > Reports and Analytics > Shared Folders > Custom > RU Saved Queries > Projects > Sponsored Summary – Budget, Cost, And Encumbrance by Expenditure Type

EXPORTING DATA

There is an Export button under each section of the dashboard that allows you to export the data in your preferred format.