Sponsored Award Budget to Actuals Report

The Sponsored Awards Budget to Actuals report gives users a life-to-date view of either the entire award (can contain multiple grants), or an individual grant.

Key Report Details

The report returns the project budget, current month expenses, fiscal-to-date, and project-to-date expenditures in the report view. It also includes cost sharing expenses, outstanding obligations, and balance available.

Available to the Following Users:
Grant Manager
Grant Financial Analyst
Lead Principal Investigator
Principal Investigator

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1. Type **Sponsored Award Budget to Actuals** in the search bar, or open the Supplemental Financial Reporting dashboard available on **Your Home Landing Page** to access the executable report link

2. Filter by:

Filter Option	Description
Accounting Period	Required prompt, is used to control the fiscal/accounting period up to which the report returns data on.
Award	Optional prompt, allows the user to run the report for any award they have a role for. **Note**: Select **Corresponding Award** when running on a grant for optimal performance.
Grant	Optional prompt, allows the user to run the report for any award they have a role for.

3. To expand the report click the arrow next to rows to allow user to 1) Expand each grouped ledger account summary section to individual ledger accounts, or 2) Expand further down to spend categories (where applicable)

4. Drill to access detailed data about underlying transactions by clicking on any blue number, or numbers in the **Total Expenses** row at the bottom of the report

Note: Expansion functionality is limited when this report is exported to Excel. It is expected this functionality will be enhanced at a later date

5. View by clicking the arrow that appears when the cursor hovers over a drillable number

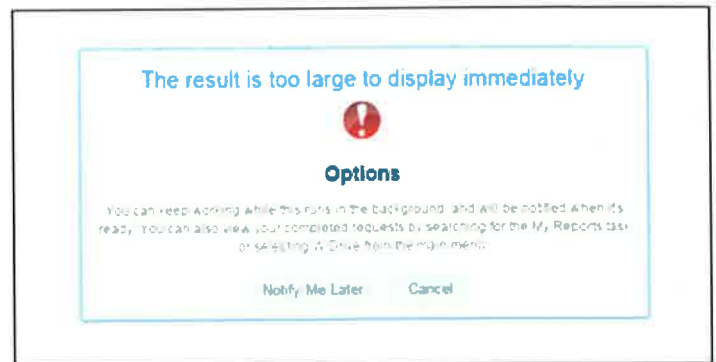6. The user is able to summarize the number in a variety of ways.

To Export to Excel:

The Sponsored Award Budget to Actuals report will export to your Workday W: Drive as an excel document, with all expansions intact. To do so, run the report and then:

- Click the Excel icon in the top right corner of your screen

- Click **Notify Me Later** when given the option to run the report in the background

- Click **OK** to send the excel output to your Workday W: Drive

The result is too large to display immediately

Options

You can keep working while this runs in the background, and will be notified when it's ready. You can also view your completed requests by searching for the My Reports task or selecting W: Drive from the main menu.

Notify Me Later   Cancel

- To retrieve the file, click on your name in the top, right corner of Workday, and then select the W: Drive