

BUD-27 Run Budget Dashboards

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to run budget dashboards in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to run the NC Budget to Actual Dashboard – Interactive Detail report and Summary report that compares the budget and actual costs to analyze variances. Budget dashboards can be used to drill down details from summary balances to detailed activity and budget transactions.

Run Budget Dashboards

To run Budget Dashboards in NCFS, please follow the steps below. There are 12 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

Step 2. On the **Home** page, click the **Budgetary Control** tab and click the **NC Budget to Actual Dashboard** app.

Image



Step 3. The **NC Budget to Actual Dashboard (RPTBE011_014)** page opens. Click the **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** tab and select the appropriate choices for all the fields from their respective drop-down choice list.

In this example, we choose:

- **Control Budget: NC Authorized**
- **Budget Period: Sep-22**
- **Agency: 0100-NC GENERAL ASSEMBLY**
- **Budget Code: 11000-GENERAL ASSEMBLY-GENERAL**
- **Budget Fund, Agency Management, Agency Program, Funding Source, Project, Inter Fund, Future 1, Future 2, Future 3: All**
- Mode: **Detail**. Note: Selecting the **Detail** mode is **mandatory**.

Image

The screenshot shows the 'NC Budget To Actual Dashboard (RPTBE011_014)' with a blue header bar containing navigation links: Home, Catalog, Favorites, Dashboards, Create, and Open. The main content area contains a grid of filter dropdowns: Control Budget (NC Authorized), Agency (0100-NC GENERAL ASSEMBLY), Agency Management (All), Project (All), Future 1 (All), Mode (Detail), Budget Period (Sep-22), Budget Code (11000-GENERAL ASSEMBLY), Agency Program (All), Inter Fund (All), Future 2 (All), Budget Fund (All), Funding Source (All), and Future 3 (All). An 'Apply' button is located at the bottom right of the filter grid. Below the filters, there are two tabs labeled 'NC Budget To Actual Bud...'. The 'Apply' button and the second tab are highlighted with red boxes.

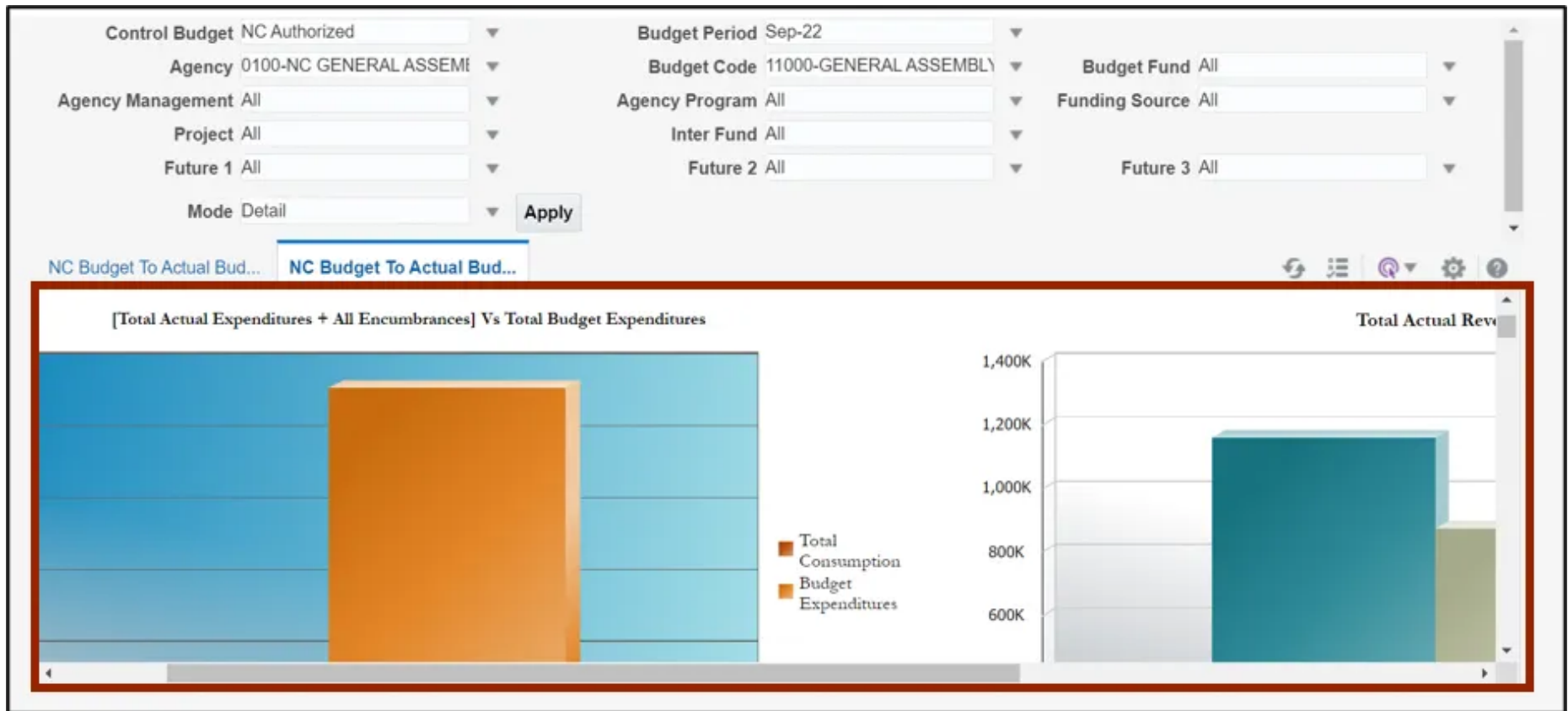
Step 4. Click the **Apply** button.

Image

This screenshot is similar to the previous one, showing the same dashboard and filter grid. However, the 'Apply' button is now highlighted with a red box, indicating it has been clicked. The tabs below the filters remain the same.

Step 5. The **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** dashboard is generated.

Image



Step 6. In the **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** dashboard, scroll down to validate the data elements and check their interactivity by clicking on the + sign next to the budget account or you can toggle between Expenditure and Revenue account.

Image

NC Budget To Actual Bud...		NC Budget To Actual Bud...					
Expenditures							
Revenue							
	⊕ 21191999 - OTHER LIABILITIES	0.00	195.10	2,482.02	(2,482.02)		
	⊕ 21389999 - PAYABLES CLEARING	0.00	11,603.11	1,054,210.62	(1,054,210.62)		
	⊕ 44109999 - SALE OF SERVICES	555,000.00	31,551.47	97,585.06	457,414.94		
	⊕ 44309999 - SALE OF GOODS OR PUBLICATIONS	1,500.00	10.00	125.92	1,374.08		
	⊕ 47199999 - MISCELLANEOUS	0.00	9.82	9.82	(9.82)		
	⊕ 47999999 - OTHER MISCELLANEOUS	4,500.00	349.56	1,666.43	2,833.57		
	⊕ 48T99999 - RETIREE SUPPLEMENT RESERVE-TRANSFER IN	137,062.00	0.00	0.00	137,062.00		
	⊕ 48U99999 - UNFUNDED SOLVENCY LIABILITY RESERVE - TRANSFER IN	176,617.00	0.00	0.00	176,617.00		
	⊕ 51110999 - EPA SALARIES AND WAGES	40,910,162.00	2,953,678.47	8,928,102.66	31,982,059.34		

Step 7. Toggle between the available data elements to view the desired output.

In this example, we click the drop-down for **Balance Type** and choose the **Budget** option in **Balance Activity Details** section.

Note: By default, all the options are selected. Deselect the options not required and click the **OK** button.

Image

Summary NC Budget To Ac...

Details NC Budget To Ac...

Balance Activity Details

Actuals
Budget

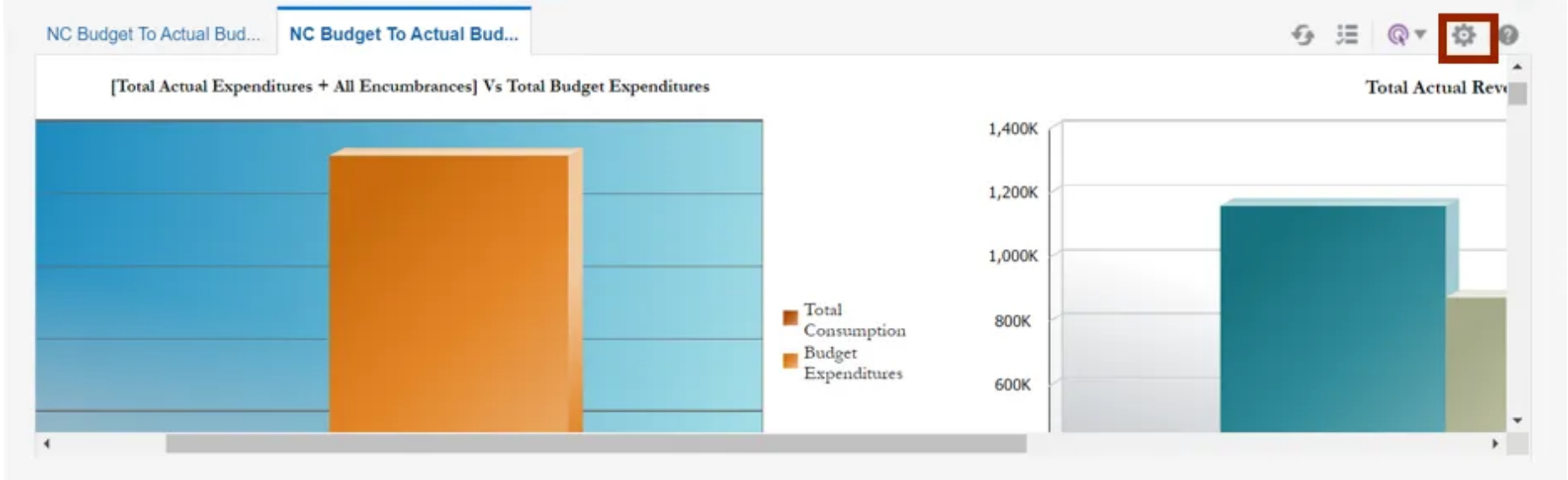
Transaction Account	Balance Type	Transaction Type	Transaction Number
100007-0100-52799000-0000000-0000000-0000-0000-000000-0000-000000-000000-000000	☐ Sort Ascending ☐ Sort Descending ☐ (Select All) ☐ Actuals ☒ Budget	Conversions	NCAS Conversion Data 0100 Sep-22 Conversions A 18 2084227 N
100002-0100-52870000-0100000-0102100-0000-0000-000000-0000-000000-000000-000000		Conversions	NCAS Conversion Data 0100 Sep-22 Conversions A 18 2084227 N
100003-0100-52870000-0100000-0102100-0000-0000-000000-0000-000000-000000-000000		Conversions	NCAS Conversion Data 0100 Sep-22 Conversions A 18 2084227 N
100010-0100-52821000-0000000-0000000-0000000-0000-0000-000000-0000-000000-000000-000000		Conversions	NCAS Conversion Data 0100 Sep-22 Conversions A 18 2084227 N
100004-0100-52913000-0100000-0104100-0000-0000-000000-0000-000000-000000-000000		Conversions	NCAS Conversion Data 0100 Sep-22 Conversions A 18 2084227 N
100008-0100-52230000-0000000-0000000-0000000-0000-0000-000000-0000-000000-000000-000000		Conversions	NCAS Conversion Data 0100 Sep-22 Conversions A 18 2084227 N

OK

Cancel

Step 8. Click the **Actions** icon.

Image



Step 9. On the **Actions** pane, click the **Export** option and select the required format to export the report. The Detail report is exported.

Image

EMBL

Budget Function

Funding Source

Interactive

Excel (*.xlsx)

Data

CSV

NC Budget

Edit Report

Edit Layout

Export

Send

Schedule

Jobs

Job History

Republish from History

Share Report Link

Online Diagnostics

Step 10. On the **NC Budget to Actual Dashboard (RPTBE011_014)** page, click the **NC Budget to Actual Budgetary Summary Dashboard_RPTBE011_014** tab. Select the applicable choices for all the fields from their respective drop-down choice list and click the **Apply** button.

In this example, we choose:

- **Control Budget: NC Authorized**
- **Budget Period: Sep-22**
- **Agency: 0100-NC GENERAL ASSEMBLY**
- **Budget Code: 11000-GENERAL ASSEMBLY-GENERAL**
- **Budget Fund, Agency Management, Agency Program, Funding Source, Project, Inter Fund, Future 1, Future 2, Future 3: All**
- Mode: **Summary**. Note: Selecting the **Summary** mode is **mandatory**.

Image

The screenshot displays the 'NC Budget To Actual Dashboard (RPTBE011_014)' interface. The top navigation bar includes links for Home, Catalog, Favorites, Dashboards, Create, and Open. The main content area contains a form with the following fields and values:

Control Budget NC Authorized	Budget Period Sep-22	
Agency 0100-NC GENERAL ASSEMBLY	Budget Code 11000-GENERAL ASSEMBLY-GENERAL	Budget Fund All
Agency Management All	Agency Program All	Funding Source All
Project All	Inter Fund All	
Future 1 All	Future 2 All	Future 3 All
Mode Summary	Apply	

Below the form, there are two tabs: 'NC Budget To Actual Bud...' and 'NC Budget To Actual Bud...'. The 'Apply' button is highlighted with a red box, and the 'NC Budget To Actual Bud...' tab is also highlighted with a red box.

Step 11. The **NC Budget to Actual Budgetary Summary Dashboard_RPTBE011_014** report is generated. In the **NC Budget to Actual Budgetary Details Dashboard_RPTBE011_014** report, validate the data elements

in the report and on the top right corner of the dashboard, click the **Actions** icon.

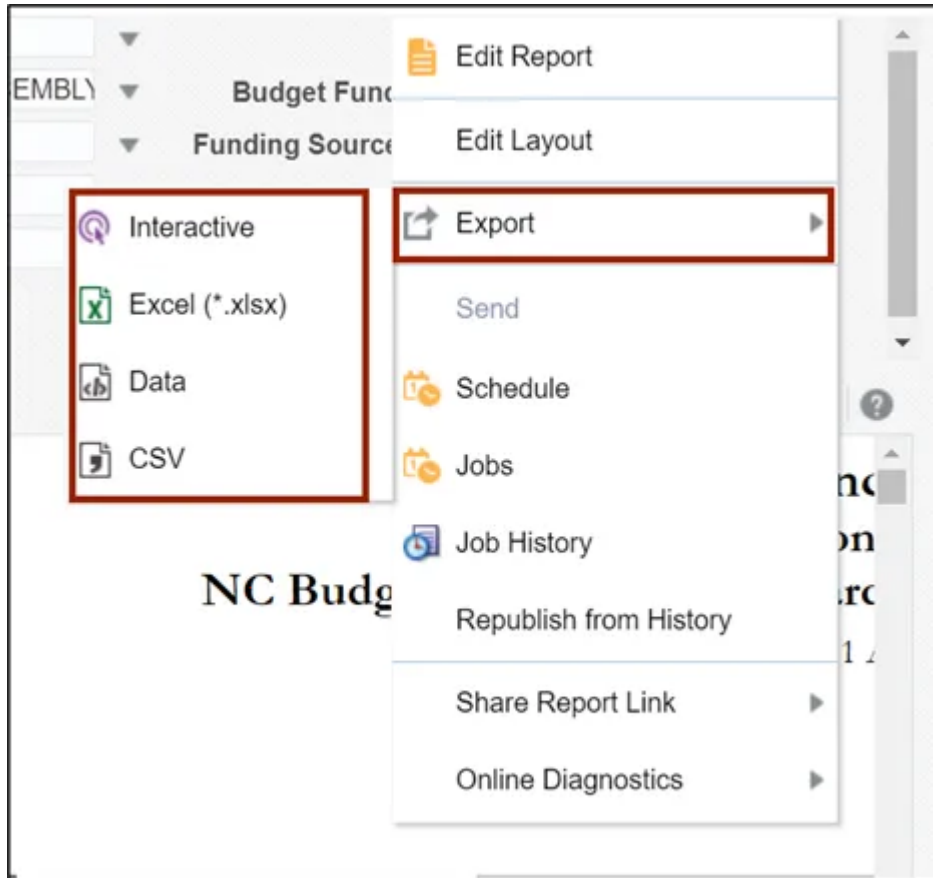
Image

The screenshot displays the 'NC Budget To Actual Dashboard' interface. At the top, there are several filter dropdowns: 'Control Budget' (NC Authorized), 'Agency' (0100-NC GENERAL ASSEMBLY), 'Agency Management' (All), 'Project' (All), 'Future 1' (All), 'Mode' (Summary), 'Budget Period' (Sep-22), 'Budget Code' (11000-GENERAL ASSEMBLY), 'Agency Program' (All), 'Inter Fund' (All), 'Future 2' (All), 'Budget Fund' (All), 'Funding Source' (All), and 'Future 3' (All). An 'Apply' button is located below these filters. Below the filters, there are two tabs labeled 'NC Budget To Actual Bud...'. To the right of the tabs are icons for refresh, list, search, and a settings gear icon (highlighted with a red box). The main header area includes the 'NCFS North Carolina Financial System' logo, the text 'North Carolina Financial Office of State Comptroller', 'NC Budget To Actual Dashboard', and a timestamp '05/29/2023 07:19:16'. Below this is a table with a red border. The table has a header row with columns: 'Expenditures', 'Revenue', 'Account', 'Description', 'Budget', 'Current Period Actuals', 'YTD Actuals', and 'Curr Balan'. The table contains two data rows: one for '21191999 OTHER LIABILITIES' and another for '21389999 PAYABLES CLEARING'. The table is scrollable, as indicated by the scrollbar on the right.

Expenditures	Revenue	Account	Description	Budget	Current Period Actuals	YTD Actuals	Curr Balan
		21191999	OTHER LIABILITIES	0.00	195.10	2,482.02	(2
		21389999	PAYABLES CLEARING	0.00	6,187.31	1,052,027.38	(1,052

Step 12. On the **Actions** pane, click the **Export** option and select the desired format to export the report. The Budget Summary report is exported.

Image



Wrap-Up

Run the NC Budget to Actual Dashboard – Interactive Detail report and Summary report that compares budget and actual costs to analyze variances. Budget dashboards can be used to drill down details from summary balances to detailed activity and budget transactions.

Additional Resources

- Web-Based Training (WBT)
 - [BU001: Budget Inquiry](#)

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