Here is a list of key features to understand:

1. The **icons** at the top right of the page include:



   a. **Undo & Redo**: These allow users to undo a previous action or reapply the action and are greyed out until an action is taken.

   b. **Refresh data**: This reloads the data and can be used if a user receives an error message.

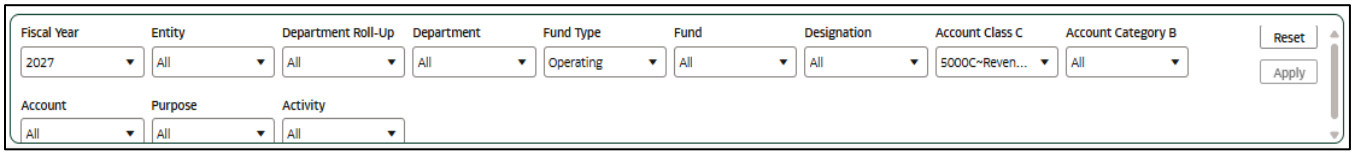
   c. **Show notes**: Currently not used.

   d. **Export**: Allows users to export, print, or email the data in various formats, including Excel and CSV.

   e. **State menu**: This is where users can save customizations. It also allows users to reset the data to its original state with a click of a button. *See Section 9.*

   f. **Navigation menu**: Currently not used.

2. To use the **Filters:**



   a. Click in the filter field or use the dropdown arrow to access available options.

   b. Users can enter the name or number into the Search field or scroll through the options.

   c. Click a value to move it to the **Selections** side.

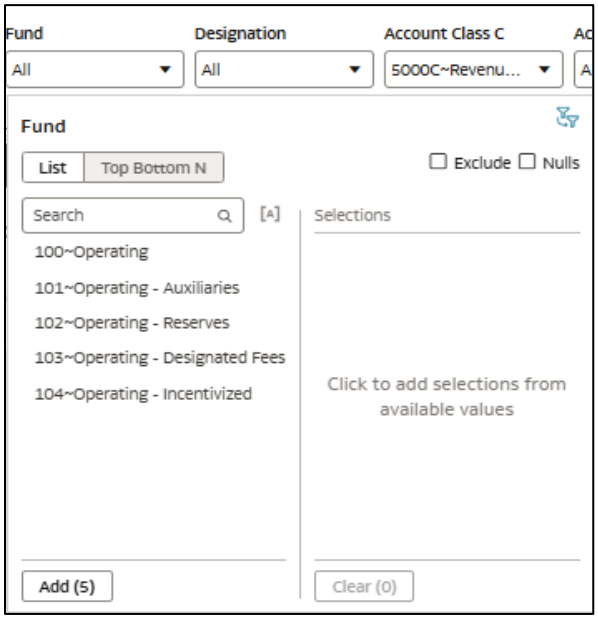
   d. To remove a value from the **Selections** side, click the value.

   e. To move all values out of the **Selections** side, click the **Clear** button at the bottom of the window.

   f. To add all values to the **Selections** side, click the **Add** button at the bottom of the window.

   g. Select a different filter or click on the white space of the report to save the filter **Selections**.

   h. Multiple values can be selected at once, including the **Fiscal Year** field.



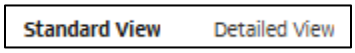
   i. The **Reset** button clears all filters.

   j. Once all filters are defined to the user's needs, click the **Apply** button to run the report.

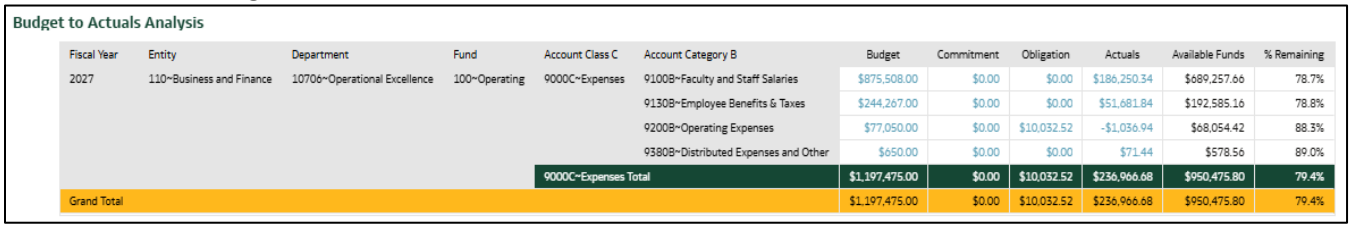


3. Assets have been moved to a separate report, the **Budget to Actuals – Assets Only (FDI Classic)**.
    a. To determine the total available funds for the departments/fund, users should add results from the Budget to Actuals and the Budget to Actuals – Assets Only report.

4. **Two Views** are automatically available at the bottom left of the screen:



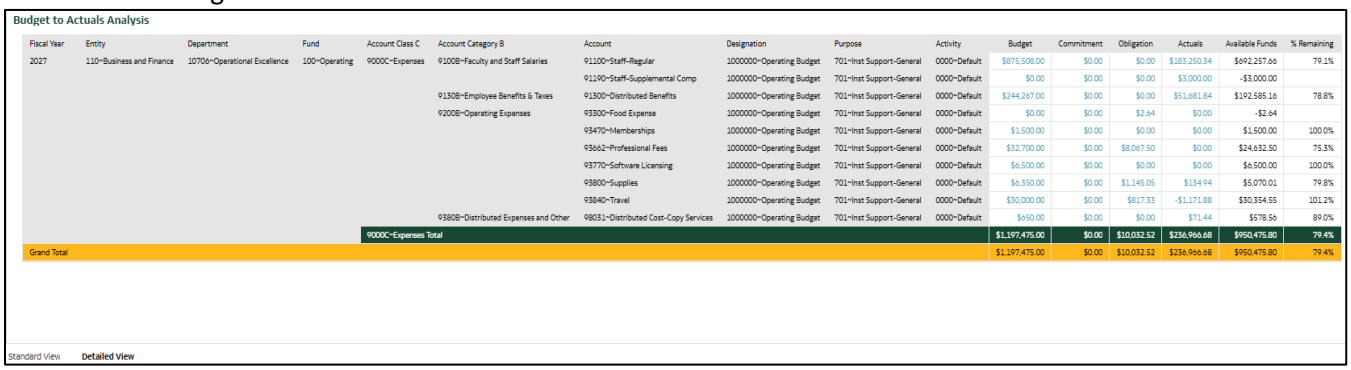
    a. The **Standard View** is a simplified report showing Fiscal Year, Entity, Department, Fund, Account Class C, Account Category B, Budget, Commitment, Obligation, Actuals, Available Funds, and % Remaining.
        i. This is a high-level report that does not break the accounts down into specific values, only their categories, and does not contain all of the COA values.



Budget to Actuals Analysis

Fiscal Year	Entity	Department	Fund	Account Class C	Account Category B	Budget	Commitment	Obligation	Actuals	Available Funds	% Remaining
2027	110~Business and Finance	10706~Operational Excellence	100~Operating	9000C~Expenses	9100B~Faculty and Staff Salaries	$875,508.00	$0.00	$0.00	$186,250.34	$689,257.66	78.7%
					9130B~Employee Benefits & Taxes	$244,267.00	$0.00	$0.00	$51,681.84	$192,585.16	78.8%
					9200B~Operating Expenses	$77,050.00	$0.00	$10,032.52	-$1,036.94	$68,054.42	88.3%
					9380B~Distributed Expenses and Other	$650.00	$0.00	$0.00	$71.44	$578.56	89.0%
				9000C~Expenses Total		$1,197,475.00	$0.00	$10,032.52	$236,966.68	$950,475.80	79.4%
Grand Total						$1,197,475.00	$0.00	$10,032.52	$236,966.68	$950,475.80	79.4%

    b. The **Detailed View** automatically contains the Fiscal year, all COA segment values, the Account Class C, Account Category B, along with the Budget, Commitment, Obligation, Actuals, Available Funds, and % Remaining.



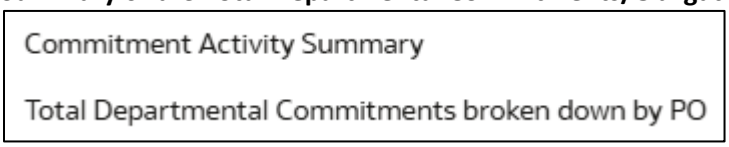
Budget to Actuals Analysis

Fiscal Year	Entity	Department	Fund	Account Class C	Account Category B	Account	Designation	Purpose	Activity	Budget	Commitment	Obligation	Actuals	Available Funds	% Remaining
2027	110~Business and Finance	10706~Operational Excellence	100~Operating	9000C~Expenses	9100B~Faculty and Staff Salaries	91100~Staff-Regular	1000000~Operating Budget	701~Inst Support-General	0000~Default	$875,508.00	$0.00	$0.00	$183,250.34	$692,257.66	79.1%
						91190~Staff-Supplemental Comp	1000000~Operating Budget	701~Inst Support-General	0000~Default	$0.00	$0.00	$0.00	$3,000.00	-$3,000.00	
					9130B~Employee Benefits & Taxes	91300~Distributed Benefits	1000000~Operating Budget	701~Inst Support-General	0000~Default	$244,267.00	$0.00	$0.00	$51,681.84	$192,585.16	78.8%
					9200B~Operating Expenses	93300~Food Expense	1000000~Operating Budget	701~Inst Support-General	0000~Default	$0.00	$0.00	$2.64	$0.00	-$2.64	
						93470~Memberships	1000000~Operating Budget	701~Inst Support-General	0000~Default	$1,500.00	$0.00	$0.00	$0.00	$1,500.00	100.0%
						93662~Professional Fees	1000000~Operating Budget	701~Inst Support-General	0000~Default	$32,700.00	$0.00	$8,067.50	$0.00	$24,632.50	75.3%
						93770~Software Licensing	1000000~Operating Budget	701~Inst Support-General	0000~Default	$6,500.00	$0.00	$0.00	$0.00	$6,500.00	100.0%
						93800~Supplies	1000000~Operating Budget	701~Inst Support-General	0000~Default	$6,350.00	$0.00	$1,145.05	$134.94	$5,070.01	79.8%
						93840~Travel	1000000~Operating Budget	701~Inst Support-General	0000~Default	$30,000.00	$0.00	$817.33	-$1,171.88	$30,354.55	101.2%
					9380B~Distributed Expenses and Other	98031~Distributed Cost-Copy Services	1000000~Operating Budget	701~Inst Support-General	0000~Default	$650.00	$0.00	$0.00	$71.44	$578.56	89.0%
				9000C~Expenses Total						$1,197,475.00	$0.00	$10,032.52	$236,966.68	$950,475.80	79.4%
Grand Total										$1,197,475.00	$0.00	$10,032.52	$236,966.68	$950,475.80	79.4%

Standard View Detailed View

    c. Columns can be added or removed to either of these views.

5. **Detail Drill-Down**:
    a. The links to detail data for Budget, Commitments, Obligations, and Actuals are available. In the Budget and Actuals column, a single click opens the detail report. Commitments and Obligations require two clicks – the first opens a pop-up menu where users can select the **Commitment/Obligation Activity Summary** or the **Total Departmental Commitments/Obligations broken down by PO**.



    b. A login prompt may appear if users access the Total Department reports. This only occurs if users have not logged directly into Ignite before accessing the Budget to Actual report (e.g., accessing the report from a bookmark, not the data portal).

    c. Detail reports are shown in a new tab.

d. When users finish with the Detail report, close the tab and return to the tab with the Budget to Actual report. DO NOT CLICK THE BACK BUTTON.

6. To **Add and Remove columns:**

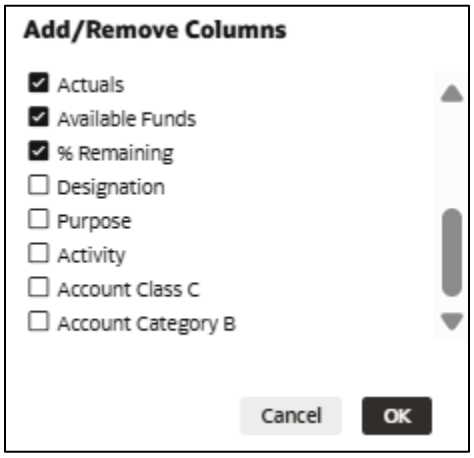
a. Right-click on the column to the left of where the new column should be inserted.

b. Select **Add/Remove Columns** from the menu.

c. The pop-up window displays the existing columns first and the optional columns next – users may have to scroll to see the optional columns.

d. At this point, users can **uncheck a box to remove it and check a box to add it**. All options can be completed at once, instead of needing to repeat the process multiple times.

e. Click **OK** to make the selected changes.



Account Class C defines the account as a Revenue or Expense.

Account Category B defines the groups within an Account Class, such as Faculty and Staff Salaries and Operating Expenses.

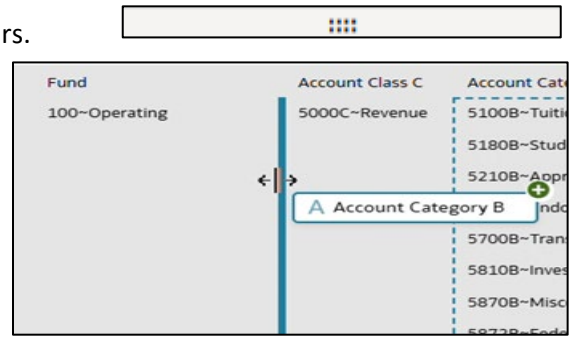
Account contains <u>both</u> a numerical and a written name.

7. To **Move a Column**:

a. Hover over the column to move until the "handle" appears.

b. Click and hold on this handle and drag between the existing columns until the blue bar appears between the columns where the column should be moved, then release the mouse button.

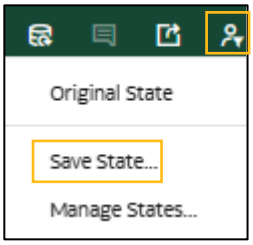
c. BE CAREFUL – releasing the mouse button outside of the table causes the column being moved to disappear. Use the **Undo** button at the top to bring it back.



8. **Data Visibility**:

a. All rows of data are displayed when the report is run; users may need to scroll to view all data.

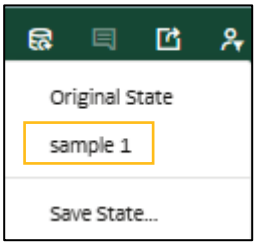
9. **Customizations**:
    a. If the Standard View and Detailed View do not meet the user's needs, they can add or remove columns as previously instructed and save their customization using the **State Menu** icon.



        i. Click **Save State** from the menu.
        ii. Name the customization and check the box if the user wishes to make this a default view.
        iii. Click **Save.**



        iv. The new customization is now displayed on the State Menu.



10. **Other items to note**:
    a. Fund 820 has been moved from Operating to Non-Operating as of June 1, 2026.
    b. If a user accidentally removes a column by dragging it off the page, they can either click the undo button arrow or the State Menu – Original State to bring the column back. It is best to only use the **Add/Remove Column** function described in *Section 6* above.

For additional questions, enter a Service Desk request or email **Business_Intelligence@baylor.edu**.