SEARCH CHARTS

Expenditure Charts are available in the Grants and Contracts Module of Novelution. Users are able to search all active NDSU grant and contract awards and view high level budget and expenditure data at the overall award level as well as sub-project level. Expenditure Charts are user friendly and are a great tool for faculty and staff to quickly see budget and spending levels on Grants and Contracts. The Expenditure Charts page contains the following information:

- **Donut Charts**: displaying total direct and indirect costs budgeted as well as total actuals spent to date
- **Line Graphs**: displaying monthly expenditure totals along with an ideal spending line
- **Bar charts**: that allow users to view budgeted and actuals spent to date by high level budget categories (personnel, operating, equipment, waivers/scholarships/fellowships, F&A) as well as the ability to view budgeted and actual spent by sub-projects, including subawards

**Navigation to Search Charts**: Expenditure Charts can be accessed by clicking on “search charts” from the drop-down menu. This feature is also accessible in all active award records listed in a user’s “search projects” list. When in a record, click on the “View Charts” icon in the upper right corner of the record to open the “search charts” page.

**Filters to Narrow Search Results and Select Award Record**: All active NDSU awards are displayed in the “search results” section and the “filter search” can be used to narrow results displayed. Users are able filter awards by PI/CO-PI, Sub-Project PI, Title, Sponsor and Peoplesoft FAR #. The search results will display rows of awards listed by the award PI, however, the main project and any associated sub-project charts can be viewed when navigating into the overall award chart page.

To view a particular award chart, click on the blue chart icon on the far right of the Search Results display box.
Award and Project Details and Donut Charts:

- Overall award details are listed in the left side of this section. If sub-projects have been set-up in Peoplesoft related to an award, the drop-down menu next to “full award” can be used to select a specific sub-project. Sub-project FAR #’s and Sub-project PI names are listed in the drop-down. All graphs on this page will automatically display a default view of the overall award details. If a sub-project view is selected, sub-project details will display to the right of the award details and all graphs adjust and display budget and expenditure date associated with the specific sub-project.

- There are two donut charts: 1) The “Total (Direct & F&A)” chart displays a combined total of Direct and F&A budgeted and actual spent to date and 2) The “Direct” chart displays only the direct costs budgeted and actual spent to date.

Burn Rate Graphs: There are three view settings for the burn rate graphs. Use the drop-down box in the upper right corner to select either the “stacked by project” or “stacked by category view”. The “stack by project view” is only available if there are multiple sub-projects associated with the award.

Default View: The stationary redline represents ideal spending from $0 on the bottom left corner to the full value of the award or sub-project in the top right corner. Monthly expenditure totals can be viewed by hovering over a month listed on the bottom of the graph. Cumulative expenditures are represented in the blue section of the graph.
Stacked by Project View: Monthly expenditure totals by sub-project can be viewed by hovering over a month listed on the bottom of the graph. The dotted line represents the cumulative total for all sub-projects.

Stacked by Category View: Monthly expenditure totals by high-level budget categories can be viewed by hovering over a month listed on the bottom of the graph. The dotted line represents the cumulative total for all budget categories.

Spending by Budget Category and Spending by Sub-Project Bar Charts:

- The “Spending by Budget Category” bar graph displays the cumulative budget and spending to date for all sub-projects listed by high level budget category. Clicking on a budget category (e.g. personnel) will change the view and the chart will then display the selected budget category (e.g. personnel) for all sub-projects. Clicking on “back to full chart” will return chart to original view.
- Spending by “Sub-Project” bar graph displays the cumulative budget and spending to date for all sub-projects listed. Clicking on a sub-project will change the view and the chart will then display high level budget categories for the sub-project. Clicking on “back to full chart” will return chart to original view.
- The gold bar represents total dollars budgeted and the blue bar represents total spent to date. Hovering over a graph bar will display the FAR# label and dollar values.