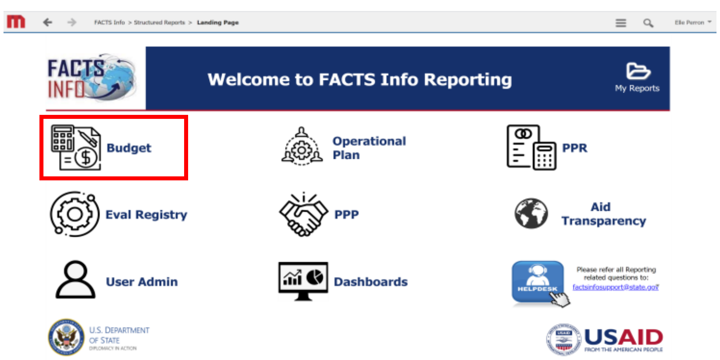
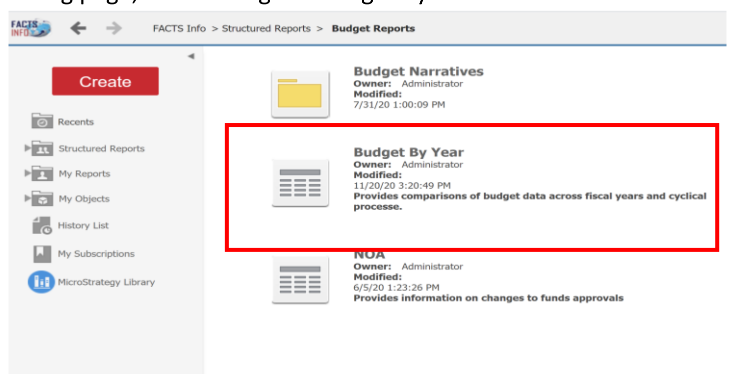
How to Generate a Budget by Year Report

The Budget by Bear report contains all the budget data the Foreign Assistance Bureau has collected from the OUs. The Budget by Year report is one of the most frequently used reports. Knowing how to generate this report will assist you with locating useful data for your analysis. In the Budget by Year report, users can select the Fiscal Year (FY) Funding, Attributes, and Filter on Attributes all on the same page.

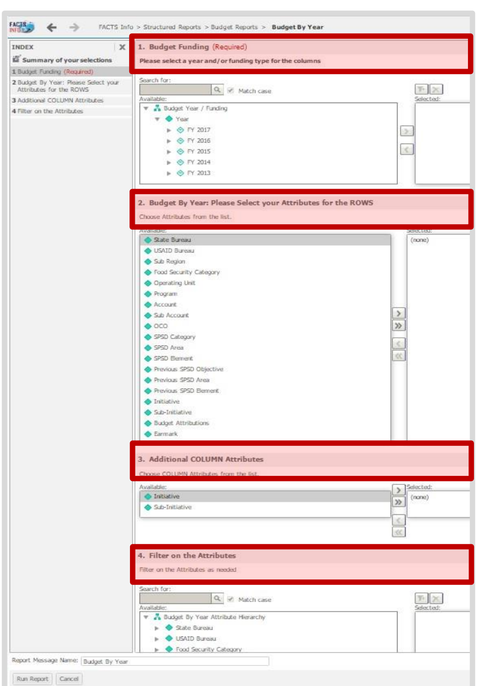
Below are step-by-step instructions showing how to run a Budget by Year Report in the FACTSInfo NextGen system.

1. Log into NextGen, double click on the Reports tile. From the Landing page, Select Budget > Budget by Year.



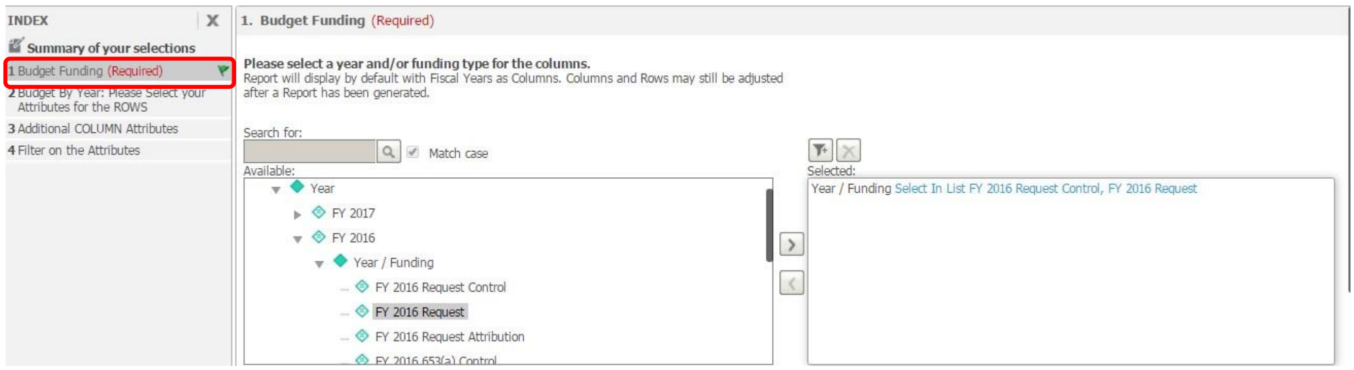


4. Note that all <u>**four Prompts**</u> now display on one page. This allows you to view all budget data available to build a report by scrolling down one page, starting with FY/Funding COLUMN(s), adding ROW and/or COLUMN Attributes), and selecting any necessary filter(s).



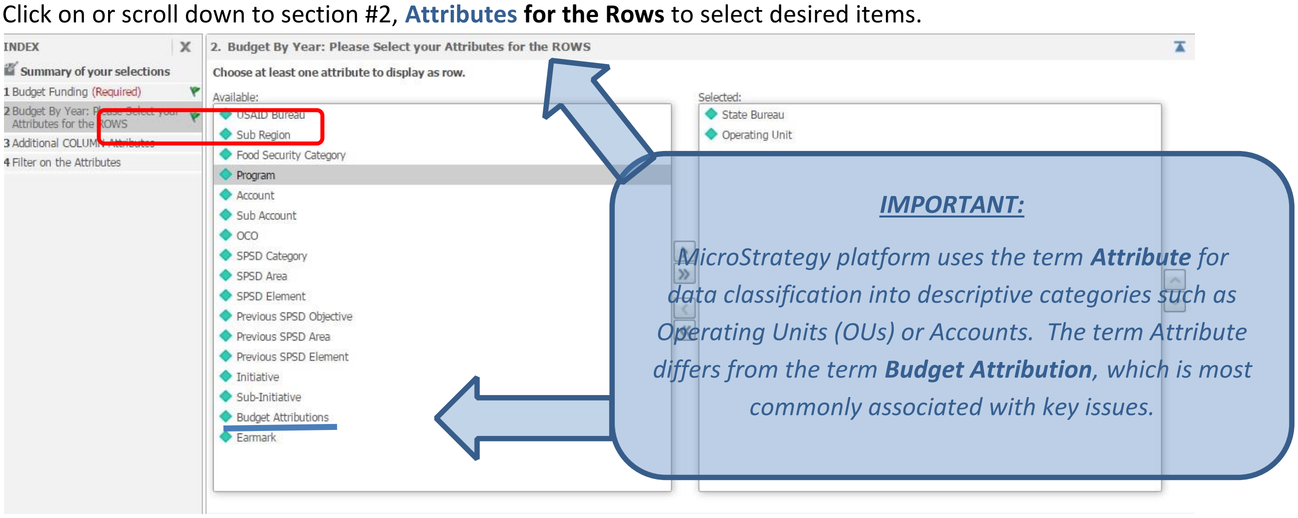
*MicroStrategy platform uses the term **Attribute** for data classification into descriptive categories such as Operating Units (OUs) or Accounts. The term Attribute differs from the term **Budget Attribution**, which is most commonly associated with key issues.*

On the left side you will see an Index **displayed in the top left-hand corner of the screen**, starting **with #1 "Budget Funding."** This is a Required step, meaning that in order to generate a report, you must select at least one item from this list. These selections will automatically display as columns. Nevertheless, once you generate the report, you will be able to switch rows and columns, if you so desire.



- This section lists all the FY/Funding currently available in the NextGen system.
- Select the FY/Funding appropriate for the report you are building. Notice that you can expand a FY, by clicking on the arrow next to it to display available funding options. (**Note**: What we now call FY/Funding, used to be called **Scenarios**.
- For each FY, you can pull allocations, attributions, and/or control data, although not every FY has all three at this time (e.g. FY 2016 lists all three: FY2016 Request which refers to allocations; FY2016 Request Attributions; and FY2016 Request Controls)
- Double click desired funding or use the arrows in the middle to move item(s) from "Available" window on the left into the "Selected" window on the right.

Click on or scroll down to section #2, **Attributes for the Rows** to select desired items.



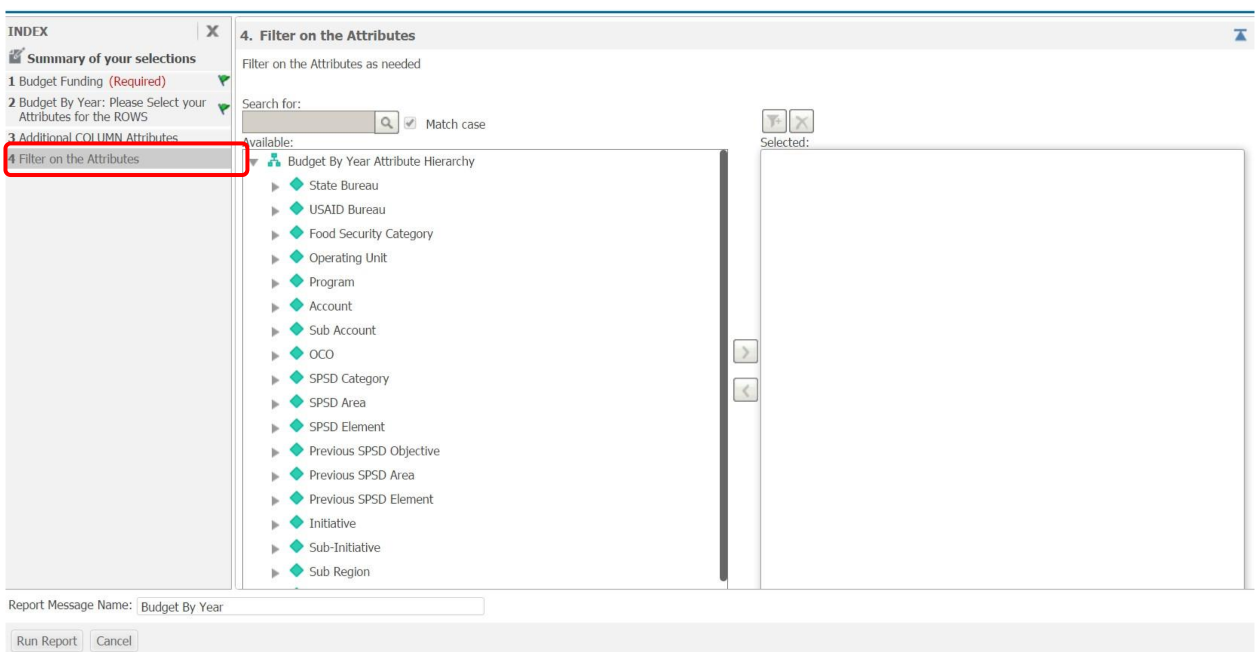
- In order to see all attributes, you may need to use the scroll bar in the "Available" window. (**TIP:** You can use your internet browser's scroll bar to move to the next section or you may click on the Index sections.)
- In this step, select the rows for your report, such as account, bureau, program area, and/or some other attribute. Select as many attributes as necessary.
- Use arrows or double click to move an Attribute over to the "Selected" window. (Note: Once a report is generated, users can adjust how rows are ordered in a report, and are able to make rows columns by dragging and dropping once a report has been generated.

Next, scroll down or select **#3 "Additional COLUMN Attributes."** This section allows you to further break down the report by Initiative or Sub-Initiative, if you so desire. This step is optional. You are NOT required to select Initiative or Sub-Initiative in order to generate a report.

- To select Initiative or Sub-Initiative from the "Available" window, use the arrows in the middle or double click desired item to move over into the "Selected" window.

Scroll down or click on section **#4, "Filter on the Attributes"**.

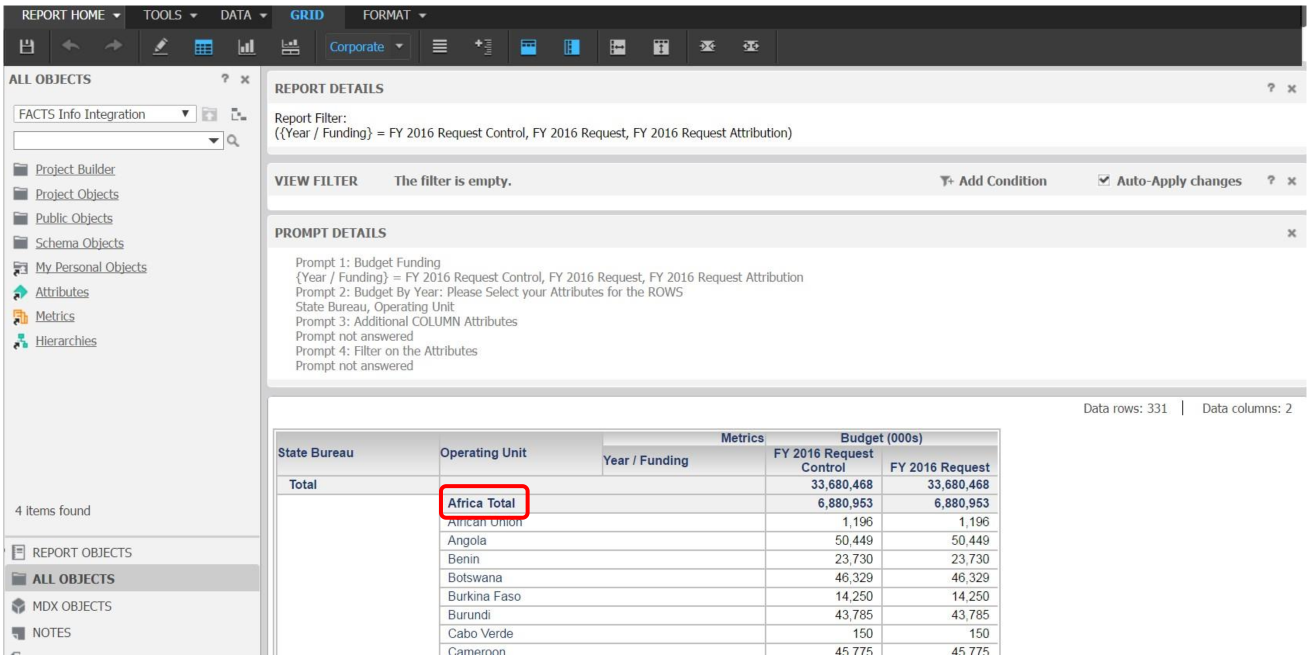
- This is an optional section which allows you to narrow the data your report will pull back. For example, if you would only like to only see Africa bureau data for USAID, you would click on **USAID Bureau** and filter on USAID Africa Regional. Filtering on your Attributes assists you to limit the amount of data you pull back. This step is not required to generate the report.
- Use the arrows to expand Attribute groups and, if desired, select a specific filter to bring over one or more items to the "Selected" window.



3. Click on "Run Report" at the bottom of the screen.

The report will generate in the same manner as before.

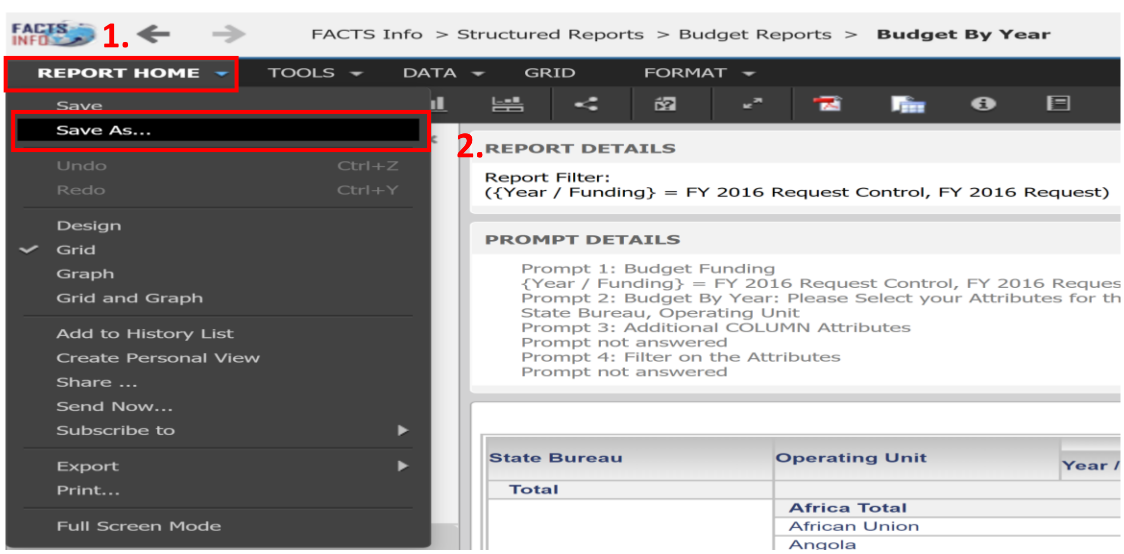
- At this point, you will be able to further manipulate the report.
- Notice that in the Budget by Year report, OUs automatically add up to the **Bureau Total** and that the name of the Bureau appears in the report.



Basic Functionalities (Saving, Printing, Sending)

How to Save a Report in My Reports

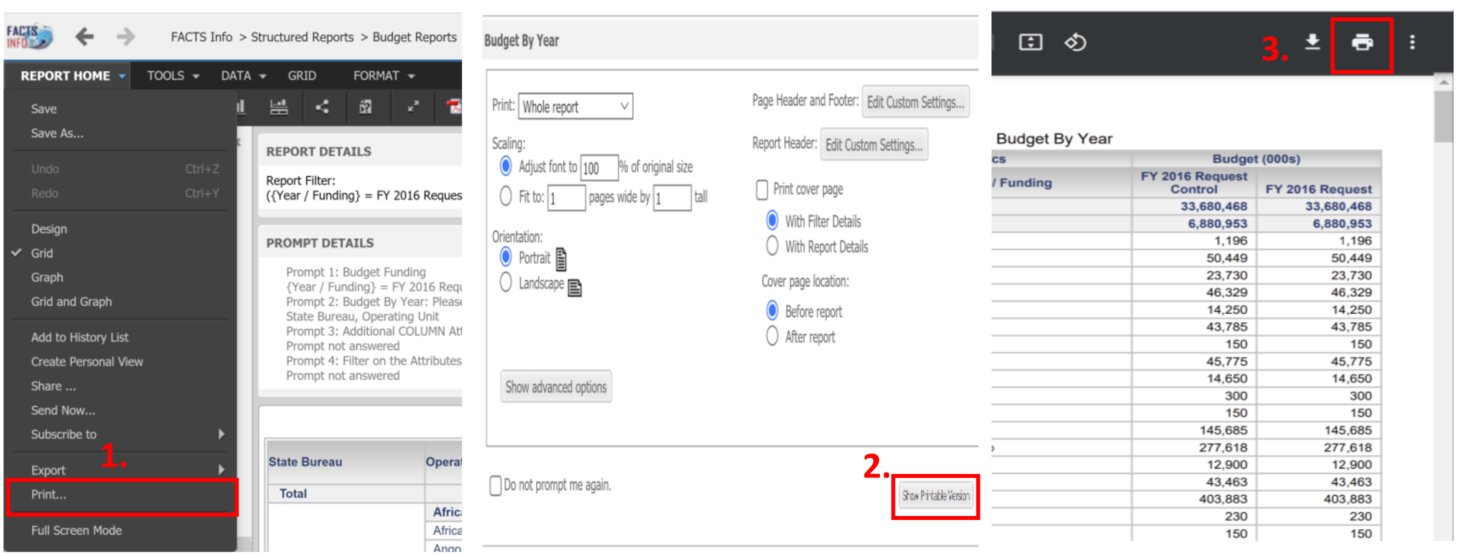
- Once you have generated a report, you can save it in the "**My Reports**" folder. Only you have access to the reports saved in "**My Reports**".



- Users can access their "**My Reports**" folder from the Reporting Module main page:

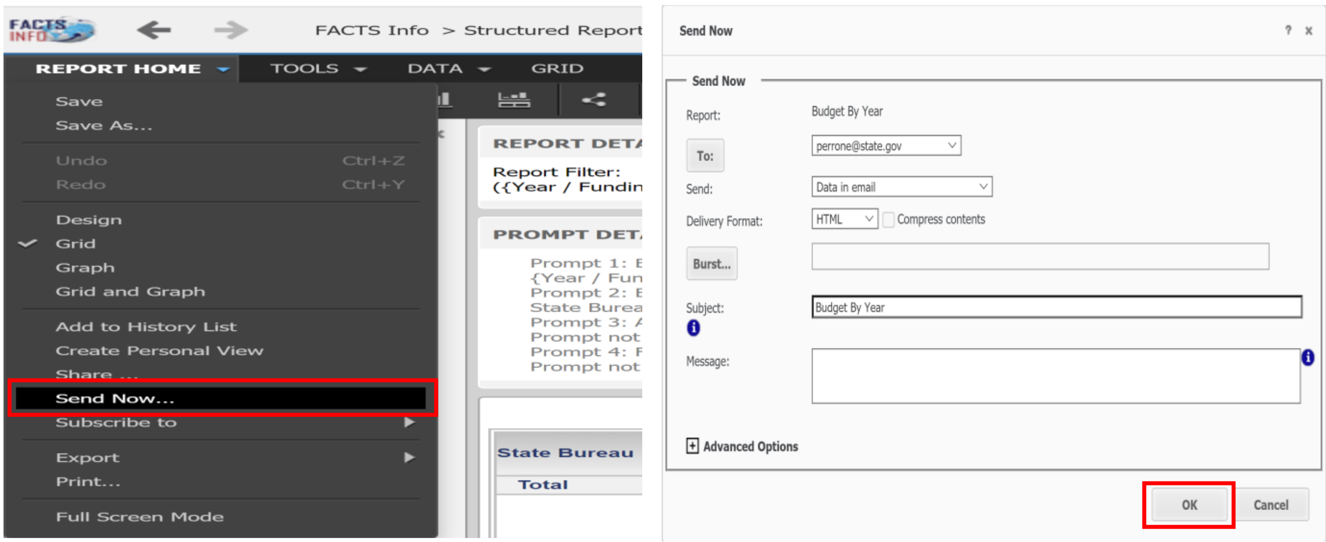
How to Print a Report

- To print the report, click on "**Report Home**" and from the drop-down menu, select the "**Print**" option. From the pop-up window, select your print preferences and click on "**Show Printable Version**". Once the printable document has loaded, select the printer icon from the top right corner of the window.



How to Send a Report

- FACTSInfo NextGen allows users to send reports directly from the Reporting Module. To send a report, users will need to save the desired report in the "**My Reports**" folder. Once the report has been saved, click "**Report Home**", and select "**Send Now**". Please be sure to review the "[Data Access Policy]" and the "[FACTS Info Data Use Policy]" located in the Help module under the "**Policies**" section prior to sending any reports from your FACTSInfo account.



If you have additional questions or need help, please contact the FACTS Info helpdesk, factsinfosupport@state.gov