

# NC BUDGET AND SPENDING REPORT

## Data Source

Data is sourced from the North Carolina Accounting System (NCAS) and the Integrated Budget Information System (IBIS).

## Update Frequency

State spending posted on NC OpenBudget is updated monthly. There is a two-month lag in the data to allow time for all monthly activity to post and to ensure the month is closed before the data is added to the site.

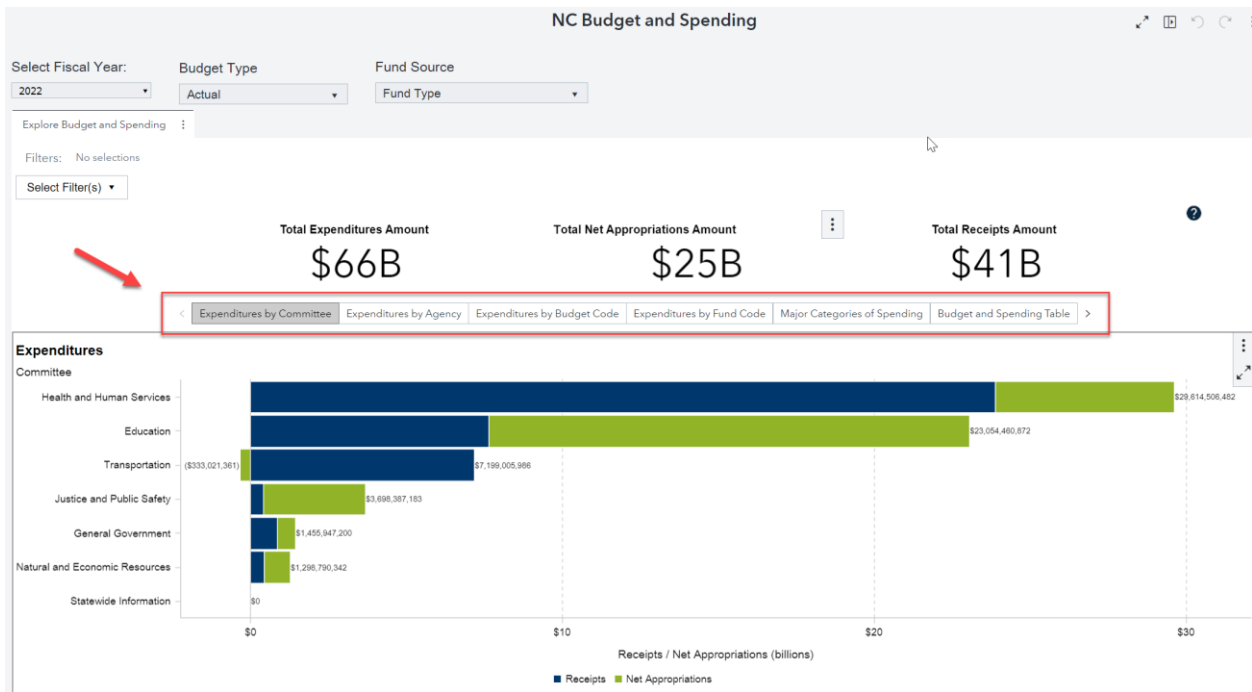
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## Purpose and Overview

The NC Budget and Spending report provides the ability to view State Budget and Spending using a set of pre-configured charts and tables. The report data can be filtered using both high-level and specific filtering methods. An optional data export is provided for access to additional data / detailed data.

The report provides sub-tabs with the following pre-sets for a quickly locating and viewing summary data:

Name	Type	Detailed Data Can Be Exported?
<b>Expenditures by Committee</b> (groupings of agencies)	Stacked Bar Chart, All	Yes
<b>Expenditures by Agency</b> (including Universities)	Stacked Bar Chart, Top 10	Yes
<b>Expenditures by Budget Code</b>	Stacked Bar Chart, Top 10	Yes
<b>Expenditures by Fund Code</b>	Stacked Bar Chart, Top 10	Yes
<b>Major Categories of Spending</b>	Bar Chart, Spending Only	Yes
<b>Budget and Spending Table</b>	Data Table, includes Account Group column	Yes



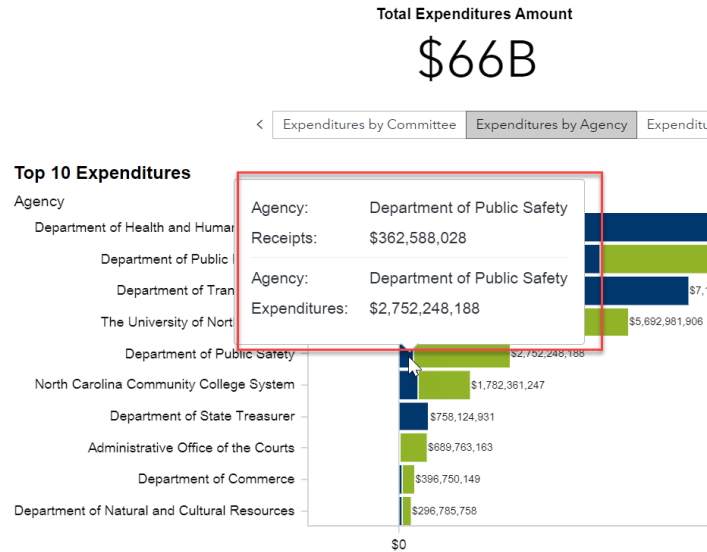
When displayed as a Stacked Bar chart, the bars represent:

- **Total Expenditures:** The combined, full length of the bar. Blue and Green portions combined
- **Total Receipts:** The portion of the Total Expenditure funded by Receipts. Blue portion of the bar.
- **Total Net Appropriations:** The portion of Total Expenditures funded by Appropriations. Green portion of the bar

## Viewing the Numbers – Hover Pop-Up

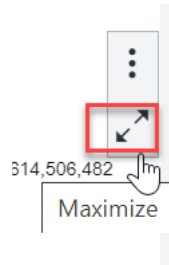
All charts provide a ‘hover’ function to view the number values behind the graphics.

As your cursor / mouse passes over a segment of the bar in the chart, a pop-up is displayed to show the underlying data for that portion of the bar.

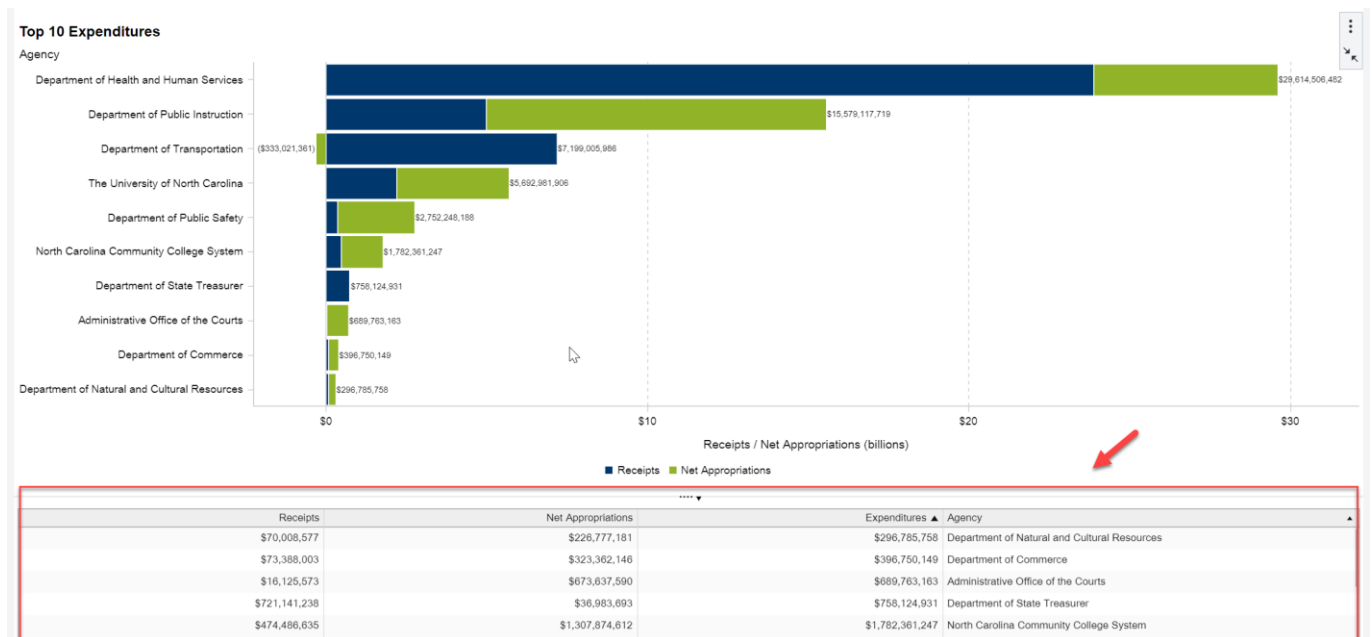


## Viewing the Numbers – Maximize to view Data Table

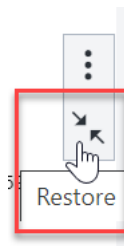
When the full chart is selected, mouse over the chart to view two additional buttons on the right corner – the 3-dot Menu and **Maximize**.



Selecting the Maximize button opens an additional data table window at the bottom of the report so that all chart values are in view at once.



Select the same button again ("Restore") to hide the data table and return to the original chart display.



## Filtering the Report – Top Filters

At the top of the report page, there are three high-level selection filters for the overall report data:

### 1. Fiscal Year

- The most recent fiscal year is the default.
- The fiscal year runs from June to the following July.
- The year displayed in the list is the ENDING year, e.g., FY 2022 = July 1, 2021 to June 30, 2022

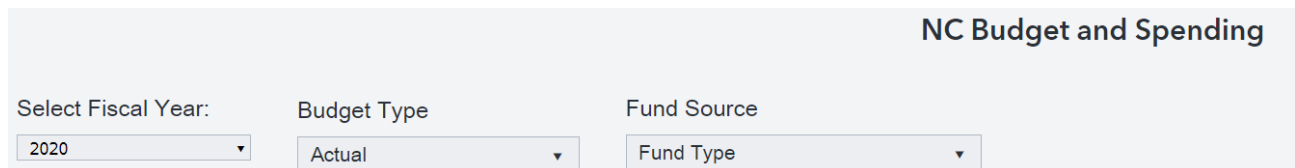
### 2. Budget Type

- Actual – default setting
- Adjusted Budget
- Budget

### 3. Fund Source

- Fund Type, or “All” - default setting
- General Fund
- Highway / Highway Trust Fund

When a Top Filter field is selected, the data on ALL sub-tabs automatically refreshes.



The screenshot shows the top filter section of the 'NC Budget and Spending' report. It contains three dropdown menus: 'Select Fiscal Year' with '2020' selected, 'Budget Type' with 'Actual' selected, and 'Fund Source' with 'Fund Type' selected.

NC Budget and Spending		
Select Fiscal Year:	Budget Type	Fund Source
2020	Actual	Fund Type

## **Filtering the Report – Filter List**

A further drill-down into the report data can be obtained by using one of the four filter sets provided in the Filter List box:

### **1. Committee**

- Allows for the selection of one or more specific Committees (grouping of agencies)
- Example: “Justice and Public Safety.”

### **2. Agency**

- Allows for the selection of one or more specific Agencies, including Universities
- Example: “Department of Labor”

### **3. Budget Code Description**

- Allows for the selection of one or more Budget Code Descriptions
- Example: “INSURANCE – GENERAL FUND”
- Only Budget Code Descriptions related to the General Fund are available in the list

### **4. Fund Code Description and Fund Code**

- Allows for the selection of one or more Fund Code Descriptions / Fund Codes
- Example: “WILDLIFE EDUCATION – 1131”
- Only Fund Codes Descriptions / Codes related to the General Fund are available in the list

***Note: If no filter selection is checked, then all listed choices will be returned in the report.***

As with the Top Filters, when a filter in the Filter List Box is selected, the data on ALL sub-tabs automatically refreshes.

## Filters – Dynamic Selections

The selections in the Filter List are dynamic (i.e., data-driven). As you select filters from the top down, the list of other available filters will adjust.

To see an example of this, select “Transportation” in the Committee filter. This will automatically limit other filters to only show values related to the Department of Transportation.

Select Filter(s) ▼

Select Committee(s)

- Education
- General Government
- Health and Human Services
- Justice and Public Safety
- Natural and Economic Resources
- Statewide Information
- Transportation

Select Agency(s)

- Department of Transportation

Select Budget Code(s)

- TRANSPORTATION - HIGHWAY FUND
- TRANSPORTATION - HIGHWAY TRUST FUND

Select Fund Code(s)

- 01 FIELD-7200

## Filters - Breadcrumbs

As filters in the Filter List are selected, they will appear in a “breadcrumb” view as a reminder that the filter is being applied to all views of the data.

The screenshot shows the 'Explore Budget and Spending' interface. At the top, a breadcrumb trail is highlighted with a red box, containing three filters: 'Education', 'North Carolina Community College System', and 'WORKFORCE DEVELOPMENT-1500'. Below this, there are sections for 'Select Filter(s)', 'Select Agency(s)' (with 'North Carolina Community College System' checked), 'Select Budget Code(s)' (with 'NC COMMUNITY COLLEGE SYSTEM - GENERAL FUND' selected), and 'Select Fund Code(s)' (with 'EQUIPMENT AND INSTRUCTIONAL RESOURCES-1623', 'EXECUTIVE DIVISION-1100', and 'FINANCE AND OPERATIONS-1300' selected). On the right, a bar chart titled 'Expenditures by Budget Code' is visible, with a red arrow pointing to the breadcrumb area and a mouse cursor hovering over the chart.

To remove a filter, click the 'X' button on the right on the breadcrumb button.

This screenshot is similar to the one above, but with a red arrow pointing to the 'X' button on the right side of the 'WORKFORCE DEVELOPMENT-1500' breadcrumb, indicating how to remove a filter.

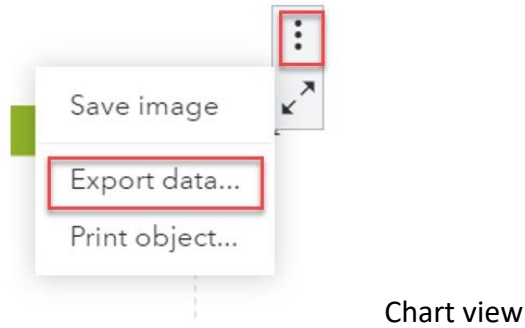
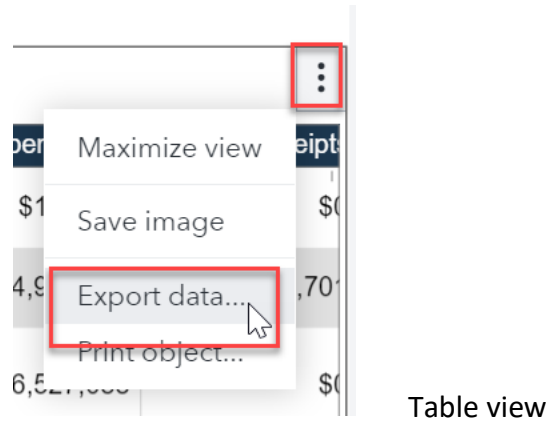


## Exporting the Data – Selection and File Types Supported

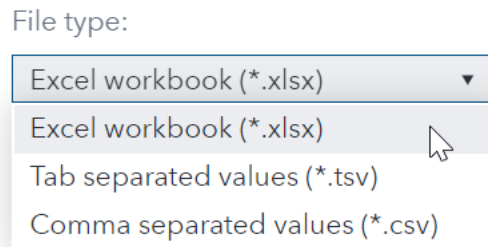
The data behind any chart or table can be exported for additional review and analysis.

When the full chart or table is selected, mouse over the chart / table to view two additional buttons on the right corner – the **3-dot Menu** and Maximize.

When selected, an “Export data...” option is provided.



The data can be downloaded in the following File Types:



## Exporting the Data – Formatted Data Option

When selecting the option to Export Data, an additional preference can be selected to indicate how the data should be presented in the downloaded file:

- **The FORMATTED Data option is Checked** - Summarizes the data by rolling together individual amount level transactions. Roll-up summary is provided by Budget Code, Fund Code and Account Group for each selected agency.
- **The FORMATTED Data option is Unchecked** - Do Not Summarize the data – show individual amount level transactions.

**Export Data** [X]

Rows:  
1 - 7368

Columns:  
 Select all

Agency  
 Budget Code  
 Account Group  
 Fund  
 Expenditures  
 Receipts  
 Net Appropriations

Options:  
 Formatted data  
 Detailed data

File type:  
Excel workbook (\*.xlsx) ▼

OK Cancel

## Exporting the Data – Detailed Data Option

When selecting the option to Export Data, an additional preference can be selected to indicate if additional data fields should be included in the downloaded file. These additional fields are available to download but are not shown on the screen.

- **The DETAILED Data option is Checked** – Additional data fields are added to the Column list at the top of the window; all additional fields are selected by default.
- **The DETAILED Data option is Unchecked** – No additional data fields are shown / selected. The data set in the downloaded file will be the same as what is shown on the screen.

**Export Data**

Rows:  
1 - 3357

Columns:  
 Select all

- Fiscal Year Numeric
- Committee
- Fund
- Account Group
- Budget Type
- Expenditures
- Receipts

Options:  
 Formatted data  
 Detailed data

File type:  
Excel workbook (\*.xlsx)

**OK** Cancel

The **Budget and Spending Table sub-tab** is one of the most frequently viewed / exported datasets. This comparison table shows the data fields provided when the “Detailed data” option is unchecked (default) vs. checked.

Data Column	Available on Screen	Detailed Option - Unchecked	Detailed Option - Checked
Fiscal Year Numeric <i>(end year)</i>	No	No	Yes
Fiscal Year	No	No	Yes
Committee	Yes	Yes	Yes
Agency	Yes	Yes	Yes
Budget Code Description	Yes	Yes	Yes
Account Group	Yes	Yes	Yes
Budget Type	No	No	Yes
Fund Code Description	Yes	Yes	Yes
Fund Type	No	No	Yes
Expenditures	Yes	Yes	Yes
Receipts	Yes	Yes	Yes
Net Appropriations	Yes	Yes	Yes

## ADDITIONAL NOTES ABOUT THIS REPORT

### Data Set Size Warning



If the Data Set Size Warning symbol is displayed in the lower right corner of a table, it indicates that a large data set has been requested but that not all rows of the information are being shown.

Filter the data to reduce the number of rows, or select the option to Export the data, which will export the full data set.

### Payee / Payments Data

Previous versions of this report included a lower level of Payee / Payment data, which has now been replaced with rollup data summaries.