

5 Year Actuals Comparison Reports

Available Reports: 1

Navigation:..... 1

Run Control:.....2

Input Parameters & Budget Period:2

Other Uses for These Reports:.....3

Reminder -- Tips for Successful Report Generation3

5 Year Actuals Comparison Reports

Available Reports:

The following new reports are now available in PeopleSoft:

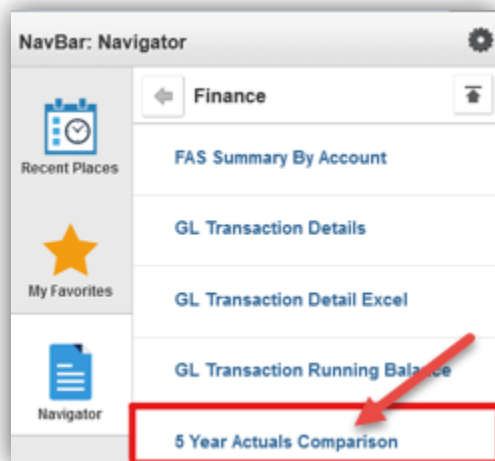
1. 5 Year Comparison of Actuals by Division – Summary By Budget Category
2. 5 Year Comparison of Actuals by Division Acct – Detail By Account
3. 5 Year Comparison of Actuals by Officer – Summary By Budget Category
4. 5 Year Comparison of Actuals by Officer – Detail By Account

The reports are not limited to Division or Officer and can be run for other lower level chartfields such as program, department or subdivision when parameters dictate.

The reports have been designed with the ability for flexible input parameters and includes the ability to select multiple ranges and chartfield exclusions.

Navigation:

Navigator Menu>Chapman Customizations>Reports>Finance>5 Year Actuals Comparison

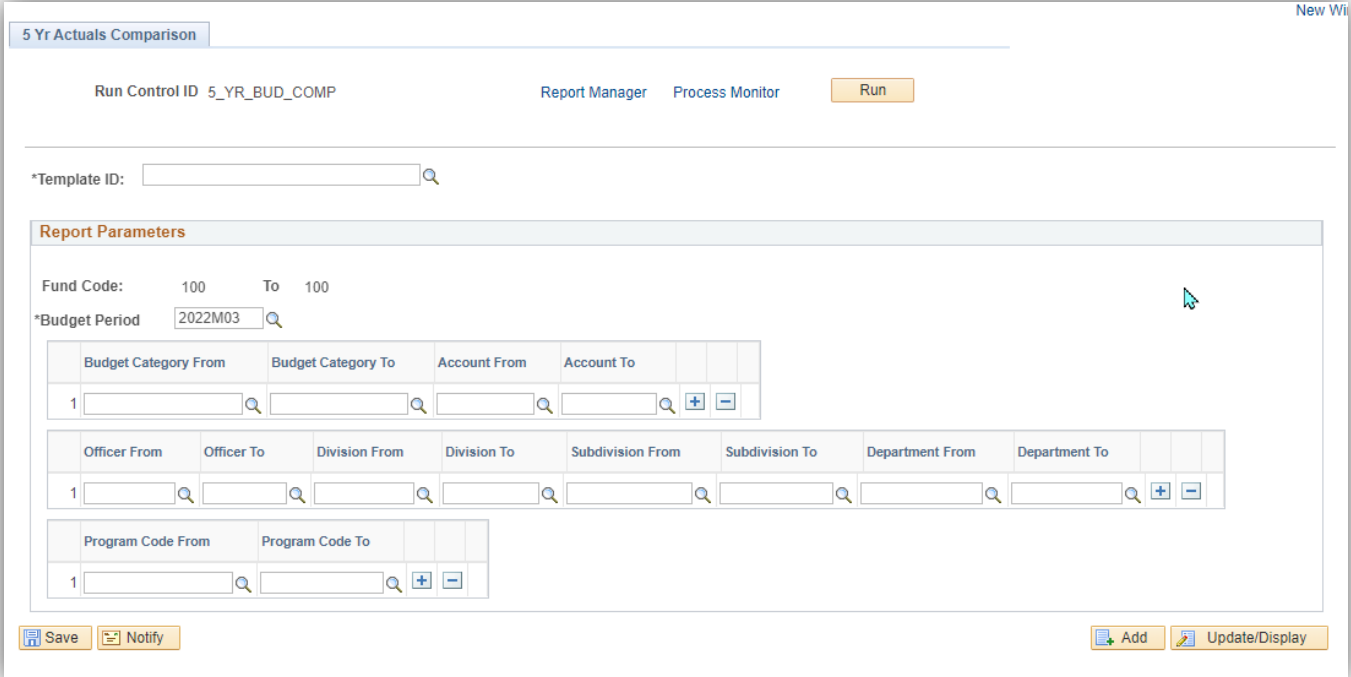


Run Control:

Select an existing run control or create a new run control. For additional details on setting up a run control see the Reports Reference Guide training document.

Input Parameters & Budget Period:

The screen shot below shows the available report parameters:



5 Yr Actuals Comparison

Run Control ID 5_YR_BUD_COMP Report Manager Process Monitor Run

*Template ID:

Report Parameters

Fund Code: 100 To 100

*Budget Period: 2022M03

Budget Category From	Budget Category To	Account From	Account To
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Officer From	Officer To	Division From	Division To	Subdivision From	Subdivision To	Department From	Department To
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Program Code From	Program Code To
1 <input type="text"/>	<input type="text"/>

Save Notify Add Update/Display

1. Template ID

The 5 Year Actuals Comparison by **Division** Summary and Detail templates and **Officer** Summary and Detail templates are currently available. Select the magnifying glass to see the list of available options for selection.

RX5DDIV – 5 Year Actuals Comp by Div Acct (Detail)

RX5DIV – 5 Year Actuals Comp by Division (Summary)

RX5DOFF – 5 Year Actuals Comp by Off Acct (Detail)

RX5OFF - 5 Year Actuals Comp by Officer (Summary)

2. Budget Period

- The Budget Period is the identifier used in the report. If you select a prior period, the report output will only include data up to that period.
- Note this report defaults to the operating Fund, Fund Code: 100. The report is only available for this fund at this time.

3. Other Input Parameters

- You can define your report by selecting parameters from the available options (Division, Subdivision, Budget Category, Account, Department, Program).
- Parameters should be selected from top to bottom. For example: If you select Division the Departments and Program selections are limited to the chartfields in that division. If you select Department and next try and select a Division, the Department chartfield may not display. If the department entered does not coincide with the division entered, the report will not generate output.

Other Uses for These Reports:

Suggestions for using the reports and running for other chartfields

Based on the user's Chart Field Security. Example: John Chapman has access only to department 1234 under division 123. Division 123 includes departments 1234,1235,1236. If John selects division 123 in his parameters, the output will only include department 1234, it will not include output for the other departments under division 123 since John doesn't have security for departments 1235 and 1236.

Tips for running the reports by other lower level chartfields. Select any template detail or summary. Detail templates summarize by account number and summary templates summarize by account category code.

5 Year Comparison by Program

- enter a specific program in both the program fields

5 Year Comparison by Department

- enter a specific department in both the department fields

5 Year Comparison by Subdivision

- enter a specific subdivision in both the subdivision fields

Reminder -- Tips for Successful Report Generation

1. Reports are currently available only for Fund 100 chartfields.
2. Multiple reports can be generated simultaneously, HOWEVER, you cannot use the same Run Control, it must be a new/different Run Control.
3. Once a Run Control is created it cannot be deleted. You can change the parameters for the Run Control and save it with new parameters, however there is not a process in place to delete Run Controls.