

Fiscal80 – Revenue or Expense Graph

About the Report

This report is for advanced users to create custom graphic representations of selected expenditure and revenue objects.

Purpose

The purpose of this report is to provide a graphic view of revenue and expenses.

Who Should Use

Budget technicians and directors use this report during budget development.

Where to Find

This report is available in the Finance-Reports-Fiscal activity.

Report Options

Request Options

- Account Fiscal year – Enter the fiscal year for the accounts. (Required) (The lookup only shows the last five years, but you may type in a year that is older and as long as there is data for that year, it will be valid.)
- Fund – Use the lookup to select a single fund for the report. Or, enter multiple funds using a comma to separate (e.g., 010,013). (Required)
- Fund title – Enter a title for the header of the report (up to 70 characters). If you leave this blank, the header displays the fund description. If you select more than one fund and leave this field blank, the title will be blank.
- Source – Use the lookup to select the source for the report. Sources include actuals, actuals/encumbrances, budget model, original budget, revised budget. (Required)

- Model ID – Use the lookup to select a model. (Required if you select budget model above.)
- Expenditures or Revenues – Select R for revenues or E for expenditures. (Required)
- Display units – Use the lookup to select the units to display (value, millions, thousands). (Required)
- Data set – Define up to ten objects with a column heading (label), delimited by a semi-colon. You can also use wildcards. For example, if your district uses objects to specifically define contributions, you could enter the objects for those contributions (e.g., 3411;Dental-Cert). You can also enter more than one object code for a single column (e.g., 3401, 3402;Medical). The object portion can be up to 100 characters. The label portion can be up to 45 characters. If only an Object or Label is provided, the same entry will be used on both object and label. At least one entry is required.

Sort Options

- Pie chart
- Bar chart
- Column chart

Special Considerations

This report filters by organizations and accounts based on user permissions defined in your user record.

An "Others" data set is added automatically if the total amount is not covered by the data set parameters. For example, if user only entered 1-4 as object codes, the chart would include "Others" for 5-7 object codes automatically.

If a user enters a semi-colon without specifying object codes, the label will be used as object code.

Wildcard fields do not support lookups. The following is a generic explanation of entering wildcards.

- ? (question mark) – Single character: "12???A" would return 12123A and 12ABBA, but not 11423A.
- * (asterisk) – Multiple characters: "123*" would return 123001, 123002, etc.
- , (comma) – Series: "123045, 549271, 573829" would return only those codes.
- .. (two periods) – Range: "123456..567890" would return all codes within that range.

You can also mix and match these wildcards. For example, you could enter "3??1, 3??2" to return only those accounts with the benefit object that matches.

Title and Subtitle

There are 3 lines of title and subtitle.

- Main title - Shows the entry from the Fund Title (if exists) OR the fiscal year and the fund description.
- Source subtitle - Shows the Source and Model Id (if appropriated), and "Expenditures" or "Revenues."
- Display Units subtitle - Show the Display Units.

Graph Type Number Format

- Pie Chart: The legend percentage shows 1 decimal, while the chart currency shows 2 decimals.
- Bar Chart: Currency shows 2 decimals
- Column Chart: Currency shows 2 decimals

Sample

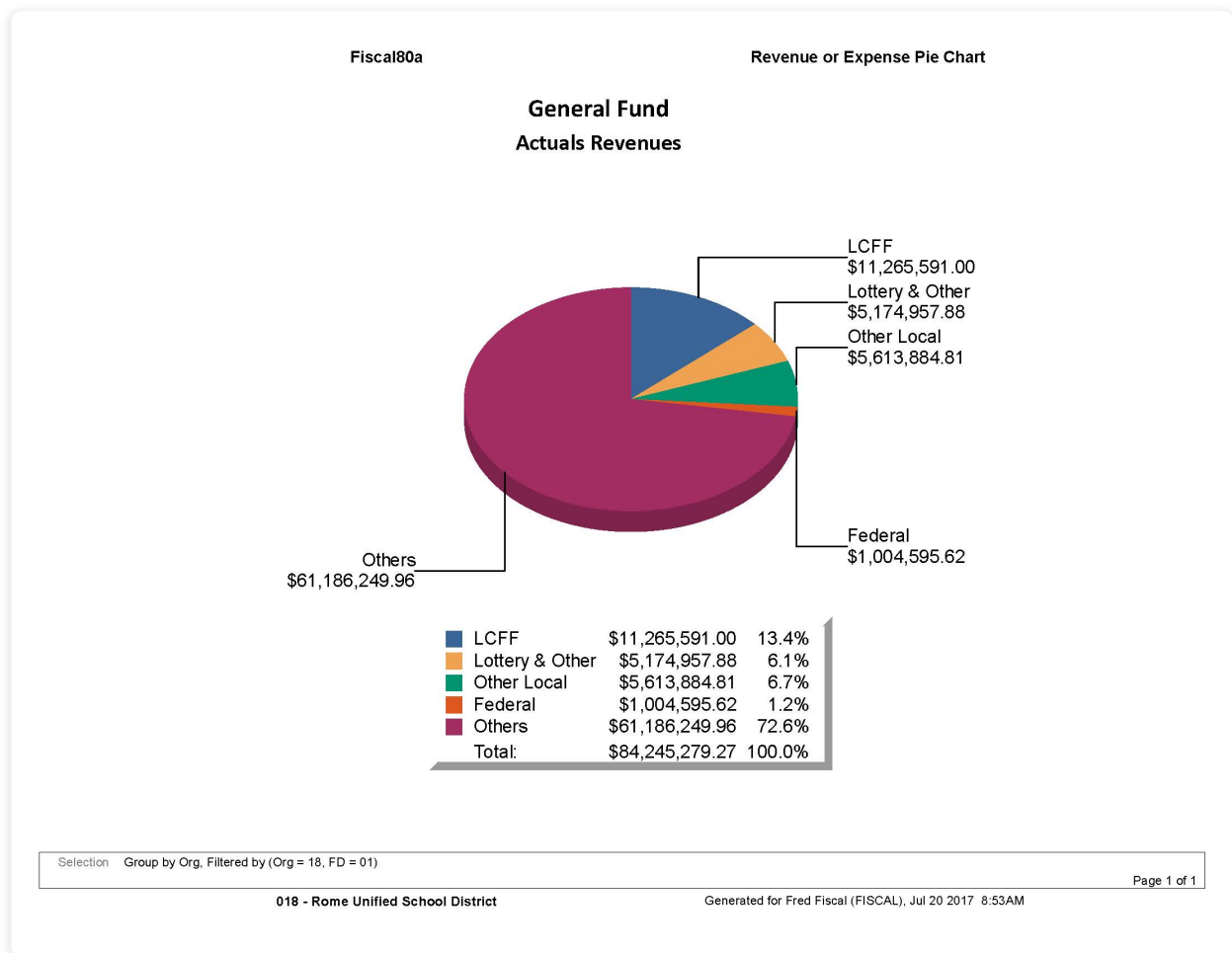
Sometimes it helps to see how someone else created custom columns. For your convenience, here are the parameters used for the report displayed in this sampler:

- Data Set 1: 8012;LCFF
- Data Set 2: 83-85;Lottery & Other

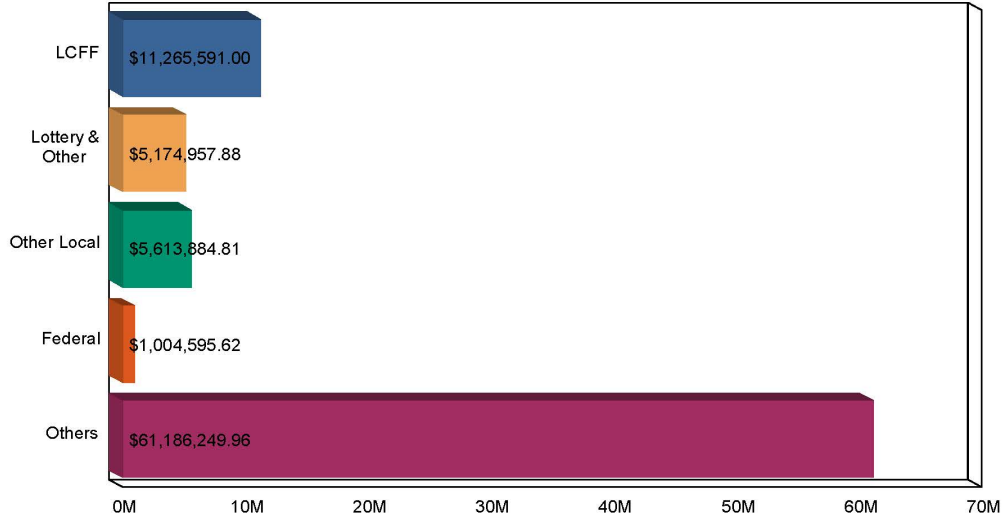
- Data Set 3: 8611, 8613; Parcel Tax
- Data Set 4: 8600, 8622-89; Other Local
- Data Set 5: 81-82; Federal

Report Source

The Crystal Reports source files are Fiscal80a (pie), Fiscal80b (bar) and Fiscal80c (column). The XML view is Fiscal80. The data source is stored procedure spRptFiscal80.



**General Fund
Actuals Revenues**



General Fund Actuals Revenues

