

Drills for current actuals ^[1]

June 12, 2017 by [Carl Sorenson](#) ^[2]

We're planning to add drill links for the current actuals in m-Fin OPERATING SUMMARY. Let us know what you think by commenting on this blog post.

Since the very first version of m-Fin OPERATING SUMMARY we have provided a drill on the fiscal-year-to-date actuals. This was the drill we heard would be the most important. But If you've been reviewing your transactions all year long, this drill keeps giving you transactions you've already reviewed. You can do *reset prompts and run* to adjust the *from* period, but we know that many users don't do this. It's not an intuitively obvious maneuver and besides, it's just normal human nature to start reading the data once it is presented. So we plan to make the current column drillable. It will show only those transactions comprising the current amount. Let us know if you like this idea.

AVAILABLE BALANCE

	BUDGET (A)	ACTUALS (B)	BUDGET BAL (C=A-B)	ENCUMBS (D)	AVAILABLE BALANCE (E=A-B-D)
EXPENDITURES BUDGET	305,151.00		305,151.00		305,151.00
EXPENDITURES ACTUALS		182,567.26	(182,567.26)		(182,567.26)
PAYROLL ENCUMBS				23,552.85	(23,552.85)
PO AND REQ ENCUMBS				0.00	0.00
REQ ENCUMBS				0.00	0.00
MANUAL ENCUMBS				0.00	0.00
F & A ENCUMBS				20,123.68	(20,123.68)
TOTAL	305,151.00	182,567.26	122,583.74	43,676.53	78,907.21

We'll make these drillable

REVENUES, EXPENDITURES AND TRANSFERS

	ACCTTREE LEVEL05	TOTAL BUDGET (A)	PERIOD 12 ACTUALS (B)	TO DATE ACTU (C)
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REVENUES

GRANTS, CONTRACTS, & GIFTS	235000 - 240997 -- GRANTS, CONTRACTS, & GIFTS	0.00	(9,628.99)	(182,567.26)
	REVENUES	0.00	(9,628.99)	(182,567.26)

EXPENDITURES

SALARIES AND WAGES	400000 - 400999 -- FAC FTP SAL	0.00	1,400.00	28,060.00
	402200 - 402499 -- STD FAC SAL	123,903.00	2,553.67	49,245.00
BEN	418400 - 420499 -- FAC FT BEN	0.00	408.80	8,045.00
	422210 - 422499 -- STD FAC BEN	52,016.00	694.34	8,246.00

m-Fin OPERATING SUMMARY current data

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Links

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