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m-Fin ACCOUNT ACTUALS PERIOD BY FISCAL YEAR [1]

November 15, 2013 by Carl Sorenson [2]

Here is an m-Fin report that can summarize a single account code, or any from-to range of account codes, showing total actuals for each accounting period across all fiscal years since 2000. You could use it to look at the monthly 000100 — CASH balance on a clinical trial, like this:

[Cash balances]

Historical cash balances

Or, because it can do ranges of account codes, you could use it to look at just salary, just operating expenditures, or just F and A expenditures. Any account range you specify will be summed up and rendered in its periods-by-fy format.

Chart options

For a simple bar in each data cell, that depicts the relative size of the cell amount, select CHART: BAR. This helps call attention to unusual amounts.

For a more sophisticated visualization, select CHART: IN/OUT BAR. This bifurcates the positive and negative transactions into two bars. I stumbled upon this in the course of developing the normal BAR option, and decided it was worth keeping. Let me know if you agree.

[In/out bar option]

In/out bar option

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