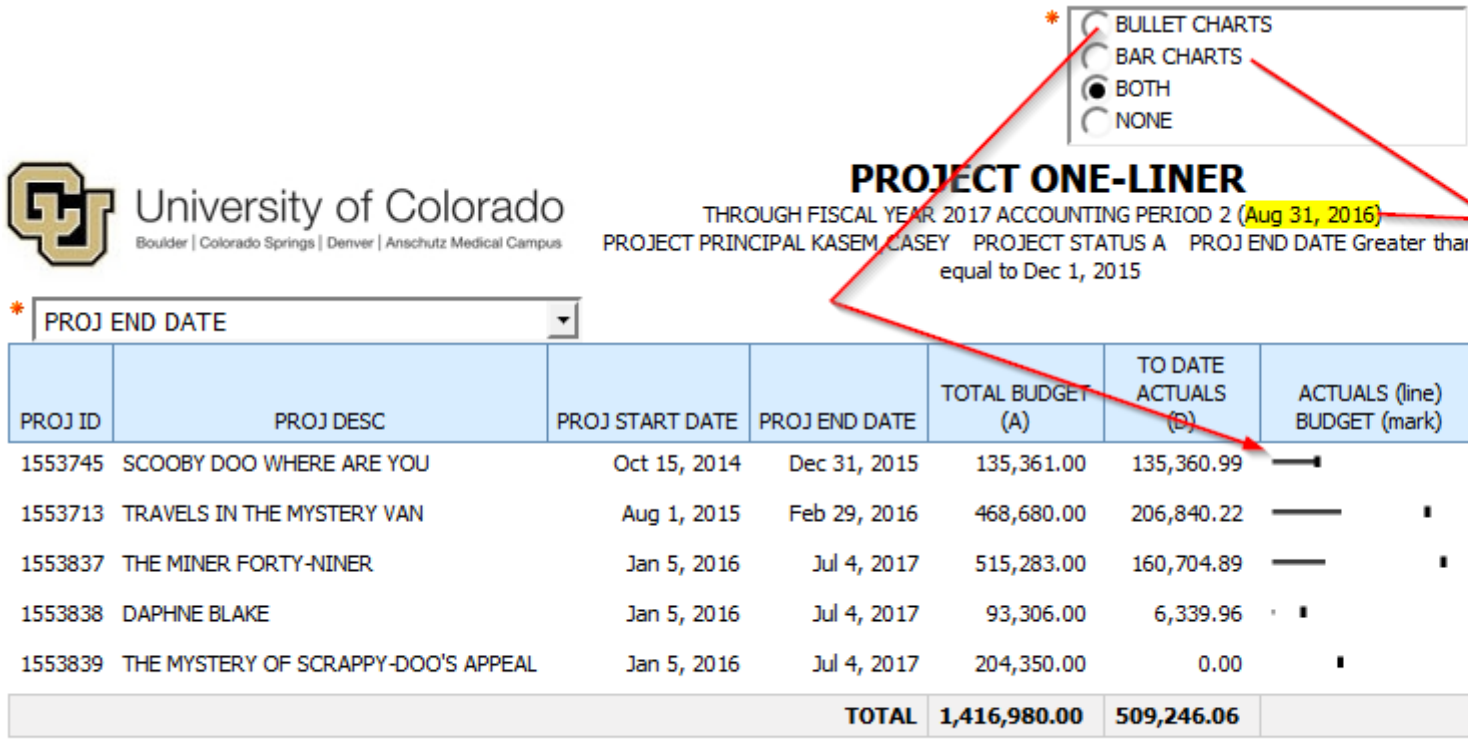
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PROJECT ONE-LINER visuals and subtotals [1]

September 1, 2016 by Carl Sorenson [2]

m-Fin PROJECT ONE-LINER gets visuals, subtotals, and more.



PROJ ID	PROJ DESC	PROJ START DATE	PROJ END DATE	TOTAL BUDGET (A)	TO DATE ACTUALS (B)	ACTUALS (line) BUDGET (mark)
1553745	SCOOBY DOO WHERE ARE YOU	Oct 15, 2014	Dec 31, 2015	135,361.00	135,360.99	
1553713	TRAVELS IN THE MYSTERY VAN	Aug 1, 2015	Feb 29, 2016	468,680.00	206,840.22	
1553837	THE MINER FORTY-NINER	Jan 5, 2016	Jul 4, 2017	515,283.00	160,704.89	
1553838	DAPHNE BLAKE	Jan 5, 2016	Jul 4, 2017	93,306.00	6,339.96	
1553839	THE MYSTERY OF SCRAPPY-DOO'S APPEAL	Jan 5, 2016	Jul 4, 2017	204,350.00	0.00	
			TOTAL	**1,416,980.00**	**509,246.06**	

Visuals

The visuals are optional bullet and bar microcharts that facilitate comparison.

The bullet charts plot a mark for the total budget and a line for the actuals. The more money spent, the closer the line reaches to the budget mark. These scale to dollars. So a big project has a budget mark farther to the right and its actuals line has a greater distance to travel.

The bar charts plot two bars for each project. A blue bar indicates the percent of budget dollars spent. A grey bar indicates the percent of days spent (how far along the project is in its begin\end lifespan). The accounting period end date (the end of month date that appears in the header of the report) is used as the current day for this calculation. So think of the bar charts as accurate to the month, not to the day. Unlike the bullet charts, these scale to percentages so no matter how big or small a project, 100% completion is a full length bar. When the grey bar reaches 100% it gets stripes to make it clear that the project is over, rather than close to over.

A bar chart like this one means the project is half over but has spent only a quarter of its budget:



Subtotals

This report had no subtotaling before. Now subtotaling by sponsor and by project principal (PI) are optionally available.

More

The EXTRAS prompt has quite a few more data elements in it so that the report can conform to a variety of needs. Don't like encumbrances? They can be completely eliminated from the report. Like encumbrances, but not F and A encumbrances? It's possible. Go for it.

More LINE SORT options are available. This just controls how the lines within each subtotal group will sort. If you set subtotal groups they dictate the primary sort.

Drilling on BUDGET BAL runs m-Fin PROJECT LIFECHART. This is a new report meant to be a simpler and faster alternative to m-Fin EXPENDITURES CUMULATIVE BY MONTH CHARTS.

This is not new, but worth repeating: The mentality of this report is one line per project. So if a project has multiple activity id's, subclass, funds, or orgs, this report sums these into a single line for the project. Unless of course you filter them out. Running for just fund 30? The dollar amounts will not reflect activity in other funds, such as cost share funds 12 or 72. Running for just org 10195? The dollar amounts will not reflect activity that might have been booked in other orgs such as 10158.

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