

Running Project Type Summary and Detail reports

Navigation: Main Menu > CWU Custom Functions > Reports > nVision Multi Chartfield Rpt

1. Run control for running the Project Type Summary report:

nVision Multi Chartfield Rpt

Run Control ID: TS_148_SUMMARY

[Report Manager](#) [Process Monitor](#)

Fill in the Report parameters, click Save(at the bottom), then click Run.

[Run](#)

*Report ID PROJECT SUMMARY BY TYPE

*Sub Report ID Summary by Project Type

*Through Date

Comments made by User manager.

Chartfield Groups Find First 1-2 of 2 Last

*Select Group Type Chartfield or Group + -

Selection Criteria Find View All First 1 of 1 Last

*Select Criteria Type Top Level of Tree

| Customize Find View All First 1 of 1 Last | |
|--|---|
| Report Field Value | Description |
| 1 <input type="text" value="CEO"/> | President + - |

*Select Group Type Fund or Group (LOCAL or 148) + -

Selection Criteria Find View All First 1 of 1 Last

*Select Criteria Type Consolidated by Fund

| Customize Find View All First 1 of 1 Last | |
|--|---|
| Report Field Value | Description |
| 1 <input type="text" value="LOCAL"/> | Local Funds + - |

Message box to prompt Users what parameters should be entered.

[Save](#) [Return to Search](#) [Notify](#)

[Add](#) [Update/Display](#)

This run control produces this report (in report manager):

| Report List | | | | Customize | Find | View All | First | 1-15 of 15 | Last |
|--------------------------|-----------|---------------|--|-----------------------|-------------------------------|----------|-------------------------|------------|------|
| Select | Report ID | Prce Instance | Description | Request Date/Time | Format | Status | Details | | |
| <input type="checkbox"/> | 969171 | 831629 | SUMMARY BY PROJECT TYPE AS OF 2012-03-31 FOR CEO FOR LOCAL FUNDS | 04/23/2012 11:03:06AM | Microsoft Excel Files (*.xls) | Posted | Details | | |

Which looks like this in Excel (detail rows collapsed):

| CENTRAL WASHINGTON UNIVERSITY | | | | | | | | | | | | | | |
|---|------------------------|---------------------|---------------------|-----------------------|---------------------|---------------------|-------------------|-------------------|-------------------|---------------------|---------------------------|----------------------|----------------------|---------------|
| Summary by Project Type for CEO - President | | | | | | | | | | | | | | |
| For fund(s): LOCAL - Local Funds | | | | | | | | | | | | | | |
| as of March 31, 2012 | | | | | | | | | | | | | | |
| Percent of Fiscal Year 75.00% | | | | | | | | | | | | | | |
| Group/Project ID | Description | Current YTD Budgets | | | Current YTD Actuals | | | | | Budget | | | Prior 2 Yr Avg Exp % | |
| | | Revenue | Expense | Bud Variance | Revenue | Expense | Transfers | Encumbrances | Net Gain/Loss | Balance | Unrestricted Beg Fund Bal | End Fund Bal | | |
| ALL | All | | | | | | | | | | | | | |
| SUMMER | Summer Session | 7,516,208 | 5,436,620 | 2,079,588 | 4,711,075 | 3,848,699 | (2,476,018) | 10,758 | (1,624,399) | 1,577,164 | 1,765,312 | 140,913 | 70.79% | 72.53% |
| MANDATORY FEES | Mandatory Fees | 3,830,350 | 4,308,548 | (478,198) | 3,990,847 | 2,897,554 | (236,091) | 125,468 | 731,734 | 1,285,526 | 579,294 | 1,311,029 | 67.25% | 77.37% |
| COURSE FEES | Course Fees | 1,204,330 | 1,436,400 | (232,070) | 1,125,468 | 781,132 | 69,582 | 68,559 | 345,759 | 586,709 | 988,252 | 1,334,010 | 54.38% | 61.29% |
| DEDICATED | Dedicated | 18,200 | 819,979 | (801,779) | (456) | 241,334 | 347,404 | 40,438 | 65,177 | 538,208 | 475,561 | 540,737 | 29.43% | 67.95% |
| GENERAL | General Administration | 9,068,261 | 15,753,673 | (6,685,412) | 7,272,198 | 8,030,454 | 2,528,436 | 301,447 | 1,468,733 | 7,421,773 | 8,938,955 | 10,407,689 | 50.98% | 63.66% |
| ALL | Totals | \$21,637,349 | \$27,755,221 | \$ (6,117,872) | \$17,099,132 | \$15,799,173 | \$ 233,713 | \$ 546,669 | \$ 987,004 | \$11,409,379 | \$ 12,747,374 | \$ 13,734,378 | 56.92% | 68.41% |

2. Run control for running the Project Summary by Type reports (detail by Ex/Div/Dept/PID):

Run Control ID: TS_148_DETAILS

[Report Manager](#) [Process Monitor](#)

Fill in the Report parameters, click Save(at the bottom), then click Run.

Run

*Report ID PROJECT SUMMARY BY TYPE

*Sub Report ID Detail for Project Type

*Through Date

Comments made by User manager.

Chartfield Groups Find First 1-2 of 2 Last

*Select Group Type Project Type Group + -

Selection Criteria Find | View All First 1 of 1 Last

*Select Criteria Type Select from Tree Node2

| Report Field Value | | Description | | |
|--------------------|---|------------------------|----------------------------------|----------------------------------|
| 1 | <input type="text" value="COURSE FEES"/> | Course Fees | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 2 | <input type="text" value="DEDICATED"/> | Dedicated | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 3 | <input type="text" value="GENERAL"/> | General Administration | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 4 | <input type="text" value="MANDATORY FEES"/> | Mandatory Fees | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 5 | <input type="text" value="SUMMER"/> | Summer Session | <input type="button" value="+"/> | <input type="button" value="-"/> |

*Select Group Type Fund or Group (LOCAL or 148) + -

Selection Criteria Find | View All First 1 of 1 Last

*Select Criteria Type Consolidated by Fund

| Report Field Value | | Description | | |
|--------------------|------------------------------------|-------------|----------------------------------|----------------------------------|
| 1 | <input type="text" value="LOCAL"/> | Local Funds | <input type="button" value="+"/> | <input type="button" value="-"/> |

Message box to prompt Users what parameters should be entered.

This run control will produce 5 reports, one for each Project Type group, these are the reports in Report manager:

| Report List | | | | | | | Customize | Find | View All | First | 1-20 of 20 | Last |
|--------------------------|-----------|---------------|--|-----------------------|-------------------------------|--------|-------------------------|------|----------|-------|------------|------|
| Select | Report ID | Prjs Instance | Description | Request Date/Time | Format | Status | Details | | | | | |
| <input type="checkbox"/> | 969178 | 831630 | DETAIL BY PROJECT TYPE AS OF 2012-03-31 FOR GENERAL FOR LOCAL FUNDS | 04/23/2012 11:11:59AM | Microsoft Excel Files (*.xls) | Posted | Details | | | | | |
| <input type="checkbox"/> | 969177 | 831630 | DETAIL BY PROJECT TYPE AS OF 2012-03-31 FOR DEDICATED FOR LOCAL FUNDS | 04/23/2012 11:11:18AM | Microsoft Excel Files (*.xls) | Posted | Details | | | | | |
| <input type="checkbox"/> | 969176 | 831630 | DETAIL BY PROJECT TYPE AS OF 2012-03-31 FOR COURSE FEES FOR LOCAL FUNDS | 04/23/2012 11:10:58AM | Microsoft Excel Files (*.xls) | Posted | Details | | | | | |
| <input type="checkbox"/> | 969175 | 831630 | DETAIL BY PROJECT TYPE AS OF 2012-03-31 FOR MANDATORY FEES FOR LOCAL FUNDS | 04/23/2012 11:08:04AM | Microsoft Excel Files (*.xls) | Posted | Details | | | | | |
| <input type="checkbox"/> | 969174 | 831630 | DETAIL BY PROJECT TYPE AS OF 2012-03-31 FOR SUMMER FOR LOCAL FUNDS | 04/23/2012 11:07:45AM | Microsoft Excel Files (*.xls) | Posted | Details | | | | | |

One of these opened in Excel looks like this (rows can be expanded to Div/Dept/PID detail):

| CENTRAL WASHINGTON UNIVERSITY | | | | | | | | | | | | | | | |
|--|------------------|--------------------------------|--------------------|--------------------|---------------------|--------------------|--------------------|--------------------|-------------------|-------------------|--------------------|-------------------|----------------------|---------------|---------------|
| Detail for Project Type: MANDATORY FEES - Mandatory Fees | | | | | | | | | | | | | | | |
| For fund(s): LOCAL - Local Funds | | | | | | | | | | | | | | | |
| as of March 31, 2012 | | | | | | | | | | | | | | | |
| Percent of Fiscal Year 75.00% | | | | | | | | | | | | | | | |
| Exec/Div/Dept/Project ID | Description | Current YTD Budgets | | | Current YTD Actuals | | | | Budget Balance | Unrestricted | | Budget Exp % | Prior 2 Yr Avg Exp % | | |
| | | Revenue | Expense | Bud Variance | Revenue | Expense | Transfers | Encumbrances | | Net Gain/Loss | Beg Fund Bal | | | End Fund Bal | |
| CEO | President | | | | | | | | | | | | | | |
| 41 | PREIDENT | President | | | | | | | | | | | | | |
| 41 | OFC PRESIDENT | Office of the President | 1,000,000 | 1,268,712 | (268,712) | 1,063,215 | 1,120,705 | - | 63,205 | (120,694) | 104,802 | 1,577 | (119,116) | 86.96% | 92.52% |
| 42 | PRESIDENT | President | 1,000,000 | 1,268,712 | (268,712) | 1,063,215 | 1,120,705 | - | 63,205 | (120,694) | 104,802 | 1,577 | (119,116) | 86.96% | 92.52% |
| 43 | ASL | Academic and Student Life | | | | | | | | | | | | | |
| 49 | ST SUCCESS | Dean of Student Life | 2,000,000 | 2,056,357 | (56,357) | 2,055,191 | 1,351,505 | (206,591) | 9,468 | 487,628 | 695,385 | 458,998 | 946,625 | 65.72% | 71.64% |
| 50 | ASL | Academic and Student Life | 2,000,000 | 2,056,357 | (56,357) | 2,055,191 | 1,351,505 | (206,591) | 9,468 | 487,628 | 695,385 | 458,998 | 946,625 | 65.72% | 71.64% |
| 51 | BFA | Business and Financial Affairs | | | | | | | | | | | | | |
| 55 | AVP ITS | Information Technology Service | 757,350 | 888,479 | (131,129) | 794,559 | 380,561 | (29,500) | 22,579 | 361,920 | 485,339 | 115,980 | 477,900 | 42.83% | 66.92% |
| 59 | AVP BUS POL | Asst VP Bus Aux & Pub Safety | 73,000 | 75,000 | (2,000) | 77,882 | 44,784 | - | 30,216 | 2,882 | - | 2,740 | 5,621 | 59.71% | 81.50% |
| 60 | BFA | Business and Financial Affairs | 830,350 | 963,479 | (133,129) | 872,441 | 425,345 | (29,500) | 52,795 | 364,801 | 485,339 | 118,720 | 483,522 | 44.15% | 68.21% |
| 61 | CEO | Totals | \$3,830,350 | \$4,308,548 | \$(478,198) | \$3,990,847 | \$2,897,554 | \$(236,091) | \$ 125,468 | \$ 731,734 | \$1,285,526 | \$ 579,294 | \$ 1,311,029 | 67.25% | 77.37% |