

Drill on a Program Center (or College)

Situation: The user runs a Financial Summary As of Period report for a division or PC/College. The DeptId is included as a column. Therefore, a row is returned for each department.

Problem: The user wants to drill and **see all the detail for the PC**, or the entire report. The current report format only allows users to drill on one department, or row. Recall that the Grand Totals at the bottom of the report are not drillable.

Solution: The solution is to reformat the report so that the entire report is just one row which summarizes the entire PC.

Example:

Assumption: Your PC = PC_FACILITIES_MGMT

You can also implement this example AND add departments in the report filters to only see the Facilities Departments that you want, in case you do not want all of PC_FACILITIES_MGMT.

Advanced Filters

Dept Tree: SAC_DEPT_TREE (circled)
 Dept Level 3: PC_FACILITIES_MGMT (circled)

Financial Summary - As of Period

Business Unit = SACST - Cal State Univ Sacramento, Fiscal Year = 2016, Period = 12
 Time run: 12/7/2016 9:14:42 AM

Show Column 1: Dept Level 3 Fdescr (circled)
 Column 2: Fund Fdescr
 Column 3: Hide
 Column 4: Hide
 Column 5: Hide
 Column 6: Hide

Select Report View: Summarized with Pre-Enc

Dept Level 3 Fdescr	Fund Fdescr	Current Budget	Actuals	Encumbrances	Balance Available	% Used Fiscal Year	Total Pre-Encumbrances	Balance Available w/Pre-Encumbrances
PC_FACILITIES_MGMT - Facilities Services	MDS01 - General Operating Fund	22,417,119.42	11,437,383.49	1,714,983.71	9,264,752.22	59%	9,554.58	9,255,197.64
Grand Total		22,417,119.42	11,437,383.49	1,714,983.71	9,264,752.22	59%	9,554.58	9,255,197.64

Acct Cat is not equal to / is not in 602
 and Acct Type Fdescr is equal to 60 - Expenditures
 and Dept Tree Name is equal to SAC_DEPT_TREE_RS
 and Dept Level 3 Fdescr is equal to PC_FACILITIES_MGMT - Facilities Services
 and Fund Fdescr is equal to MDS01 - General Operating Fund, AF181 - Asset Management 0573 181
 and Bus Unit Fdescr is equal to SACST - Cal State Univ Sacramento
 and Fiscal Year is equal to 2016

Drill here for dept details (circled)