User Guide for:
Analytics Operating Budget & Trend Report

Who should use this guide:
Campus financial planners involved in the All Funds Planning process.

Purpose:
The report provides a source and use summary for three prior fiscal years, the current year forecast, next year’s proposed budget, and the two planning years.

The report currently displays data for budget year 2022. When the next planning cycle begins in January, the report will be updated to also display budget year 2023 data.

Locating the report:
1. Go to UAccess Analytics and click on the ‘Operating Budgets & Multi-Year Plans’ dashboard.
2. Click on the ‘Current Year Operating Budget’ tab and then ‘Operating Budget and Trend’.

Navigating the report:

Use the filters at the top of the report to return data based on criteria like organization level, planning fund, and budget object.

The report is comprised of three sections. The first section of the report displays revenue and expense data with a net change calculation at the bottom.
The second section of the report displays beginning and ending fund balance information.

The third section of the report calculates summary ratios on the displayed data.

Each of the three sections has a ‘Select a View’ drop down. Users have the option to update the view to bring in budget request data entered in Axiom.
Understanding your data:
The data displayed in the report walks back to the Operating Budget Module in Axiom and the report is formatted in a similar fashion.

The revenues and expenses are listed by budget objects and grouped by budget categories and budget groups.
The columns of prior year actuals tie to KFS actuals through period 13.

The Current Budget column represents the proposed budget planned in Axiom during the prior planning cycle. The Forecast column is the sum of the ‘Actual July-Dec’, ‘Forecast Jan-Jun’, and ‘Forecast Adjustment’ columns in the Operating Budget Module in Axiom.

The Proposed Budget column is next year’s planned budget and the two Plan columns are the two additional planning years beyond that.
When the next planning cycle begins in January, the report will be updated to also display budget year 2023 data. Users will update the ‘Budget Year’ filter to bring in budget year 2023 data.

For questions about the new report, please contact your assigned analyst.