Training Guide for:
Consolidated Summary Drill Report

Who should use this guide:

Departmental and/or College financial planners involved in the All-Funds management and planning.

Purpose:

This report provides a multi-year summary report of sources and uses for a specific college/division, summarized by Planning Fund and Budget Object. The report also provides year to year changes ($ and %).

Locating the report:

Arizona.axiom.cloud

Revised: November 2021
Navigating the report:

Use the filter menu to access current planning budget data and to retrieve information by College Code, Budget Group and Budget Request Status.

- **Planning Year** - Use this filter to access data for current Budget Year or prior Budget Year.
- **College Code** - Select the desired college from the drop down menu, you can also type in the field keywords (College name or code) to narrow down your options. This is a required field and you can display only one college at the time.
- **Budget Group** - Select the desired budget group (budget object groups such as Travel, Operational Expenditures, etc) from the drop down menu. The report will display budget object data associated with the budget group selected in the filter. You can also type in the field keywords to narrow down your options. Only one budget group can be selected at the time.
- **Budget Requests** - This is a required field and is used to filter data based on the Budget request status. Select ‘None’ if you wish to exclude Budget Request data from the report.

Your selections will be displayed at the top of the report.

Revised: November 2021
The report also offers the Export to Excel option, located on the top-right corner:

**Understanding your data:**

The report provides sources and uses data for a college displayed by Planning Fund and Budget Object. The report will display budget object data associated with the budget group selected in the filter, if any. The information displayed in the report comes from the Operating Budget module.

The columns consist of the following:

- Prior two years of actuals tie to KFS actuals through period 13
- Forecast, Budget and Plan years is based on data submitted in the Budget Module.
- Current Budget ties to Current Budget in KFS
- Changes from year to year are displayed in the % Change and $ Change columns for all planning years, including for prior years.

For additional questions, please contact your assigned **Budget Analyst**.