

# Yale Interactive Reports

Interactive Reports

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POWER BI REPORTS (8)

Budget Compare and Project

Budget Variance Analysis

Detailed Transactions Tree

FD29 Industry Clinical Triz

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## Budget Compare and Project

This report provides comparisons to the prior year and projections for the current year. This includes variance analysis with Current FY Year Forecast (CYF). Drill through features allow an understanding of budgets and activity by different COA segments plus the ability to drill all the way through to transaction-level detail.

### Who would use this report?

Anyone who does complex budget analysis, including year-over-year comparisons between different budget types.

### When would you use this report?

This report is particularly useful for quarterly budget monitoring, Q2, and the annual budget process.

### Why would someone use this report?

Use this report to compare different types of budgets all on one page.

### What questions is this report designed to answer?

- How am I doing compared to last year?
- Did I submit a revised budget to account for a known change?
- How accurate is my forecasting?

Charging Planning Unit:  Charging Department Grouping:  Charging Cost Center:  Fund Operations Summary Name:  Fund:

Values are for whole FY unless YTD Specified (This report defaults to Last Closed Month.)

[Click Here to Select Visual](#)

Ledger Account Class Name	Prior FY Corp Budget	Current FY Corp Budget	Prior FY Q0 Budget	Current FY Q0 Budget	Prior FY Q2 Forecast	Current FY Q2 Forecast (upon Opening)	Prior FY Dept Plan	Current FY Dept Plan	CY Forecast	Current YTD Actuals
<input type="checkbox"/> Balance Sheet	1,277,456,218.84	1,503,652,289.88	693,173,502.64	-192,363,775.97	1,452,458,676.41	1,727,856,252.74	95,530,288.40	140,649,229.59	1,727,856,252.74	1,741,508,283.
<input type="checkbox"/> Net Balance	1,277,456,218.84	1,503,652,289.88	693,173,502.64	-192,363,775.97	1,452,458,676.41	1,727,856,252.74	95,530,288.40	140,649,229.59	1,727,856,252.74	1,741,508,283.
<input type="checkbox"/> Net assets: Yale U...	1,277,456,218.84	1,503,652,289.88	693,173,502.64	-192,363,775.97	1,452,458,676.41	1,727,856,252.74	95,530,288.40	140,649,229.59	1,727,856,252.74	1,741,508,283.
<input type="checkbox"/> Revenue	4,274,983,364.19	4,762,441,623.86	2,394,427,980.07	178,058,811.06	4,361,338,213.67	4,813,640,358.18	619,278,498.92	802,143,549.78	4,520,438,937.53	3,726,501,633.
<input type="checkbox"/> Tuition, Room and...	691,327,473.92	889,462,023.28	78,510,248.04	51,420,577.00	666,449,388.87	885,188,307.14	80,945,660.00	77,675,927.00	886,215,000.37	848,811,264.
<input type="checkbox"/> Gross Tuition	611,808,900.96	780,551,618.00	78,499,854.00	50,235,998.96	626,560,985.28	777,528,500.96	79,761,594.00	76,491,349.00	779,214,485.67	761,467,253
<input type="checkbox"/> Room	47,746,651.16	64,243,707.08	5,394.00	1,158,452.00	25,785,889.38	63,019,234.07	1,158,452.00	1,158,452.00	62,339,985.05	62,056,980
<input type="checkbox"/> Board	31,771,921.80	44,666,698.20	5,000.04	26,126.04	14,102,514.21	44,640,572.11	25,614.00	26,126.00	44,660,529.65	25,287,030
<input type="checkbox"/> Tuition Discount	-357,733,141.65	-436,891,393.05	-45,815,125.68	-27,938,865.77	-352,277,588.01	-433,676,325.65	-31,254,934.72	-33,625,558.95	-468,615,328.89	-426,298,972.
<input type="checkbox"/> Discount on Tuition	-357,733,141.65	-436,891,393.05	-45,815,125.68	-27,938,865.77	-352,277,588.01	-433,676,325.65	-31,254,934.72	-33,625,558.95	-468,615,328.89	-426,298,972.
<input type="checkbox"/> Grant and Contrac...	838,283,227.35	920,867,524.77	793,713,393.66	4,680,639.22	873,003,981.56	946,018,003.27	17,841,596.69	18,195,289.07	884,841,542.86	551,521,153.
<input type="checkbox"/> Sponsored Agree...	811,434,540.88	880,216,466.68	757,571,337.76	6,980,937.68	830,668,014.60	903,895,570.90	17,943,139.69	18,663,451.07	1,060,681,839.08	527,741,863
<input type="checkbox"/> Facility and Admin...	-220,327,244.53	-238,624,330.51	-216,712,193.38	-2,384,911.30	-225,629,748.25	-245,077,926.41	-2,993,210.00	-2,518,383.00	-258,192,853.09	-140,542,560
<b>Total</b>	<b>1,250,047,120.36</b>	<b>1,601,032,617.77</b>	<b>707,351,218.47</b>	<b>-190,417,293.82</b>	<b>1,551,287,832.02</b>	<b>1,872,694,616.91</b>	<b>137,728,897.96</b>	<b>159,138,286.09</b>	<b>1,678,692,806.63</b>	<b>2,815,403,131.</b>