Budget Report – Comparing to Actual – Excel Version (UFS)

Available in UFS, this GL report allows users to monitor actual spend against Chest allocations. This version provides output in Excel format but there are other versions available in UFS:

- Budget Report – comparing to Actual Summary (UFS)
- Budget Report – comparing to Actual (UFS)

Responsibility: GL Dept Supervisor/User/Enquiry
Navigate: Requests > Run

Parameters
Enter the relevant parameters.

There are now two options for the Budget field:

**ALLOCATION:** This is the Allocation of funds from the Chest based on the University’s annual planning exercise (typically the A*** sources of funds). Previously known as the ‘Chest Budget’, most but not all departments will have such a budget.

**PLAN:** This is currently being trialled by a small number of departments.

Here a second budget called ‘Plan’ has been uploaded to UFS and combined with a copy of the department’s ‘Chest Allocation’. The ‘Plan’ budget is one that has been produced locally by the department for their non-Chest funded activities.

The aim is that by selecting this budget parameter the department will be able to compare their actual activity against budgets across all sources of funds.

Submit the report to run. Once Completed an icon will appear in the output column, which you will need to click on.

A pop up message will display, it is recommended that you **Save As** first and then **Open**.
Example output

A workbook containing two worksheets will open