Forecast View-VPA
Guideline and Training Manual

Financial Reporting Department

This document is also available online at www.yorku.ca/finance/documents.htm
Forecast View - VPA

Go to Finance > Forecast & Budget Call > Forecast View-VPA

The Forecast View-VPA report is used primarily by the Office of the Vice-President Academic & Provost (VPA). It presents the Forecast Submission One and Forecast Submission Two in the VPA format where the main difference from the Forecast View report lies within the accounts groupings.

Step 1:
View Forecast By:

(1) **Financial Rollup**- View consolidated report (Sum of all Cost Centres under the Financial Rollup selected) or

(2) **Cost Centre**- View single Cost Centre (Sum of ATL entries for a specific Cost centre) or

(3) **Activity/Time/Location (ATL)**- View a specific Cost Centre-ATL combination

Step 2:
Choose the detail level:

(1) **Details**- List all the accounts

(2) **Summary**- List by main account groupings

Skip this step if ATL is selected in Step 1.
View by Financial Roll-up

**Step 3 for FRU:**

(1) Select Financial Rollup

![Select Financial Rollup](image1)

(2) Click on

![Click on](image2)

(3) Select the Financial Rollup

![Select Financial Rollup](image3)

Tip#1: Click on the white circle besides the name of the Financial Rollup to select a particular rollup.

Tip#2: All the Financial Rollup names are hyperlinked. Click on the name of the sub roll-up to expand and click on the name of the main roll-up to contract.

(4) Click

![Click](image4)
View by Cost Centre

**Step 3 for CC:**

1. Select Cost Centre

2. Enter the Cost Centre number

View by Activity Time Location

**Step 3 for ATL:**

1. Select Activity/Time/Location (ATL)
(2) Enter the Cost Centre number

(3) Enter the Activity Code, Time Code, and/or Location Code.

**Step 4:** Select the Fund Code, i.e. 100, 200, or 300.

**Step 5:** Select the Accounting Period for Actuals. (Accounting period cannot be selected if viewed by Financial Roll-up)

**Tip:** The numbers shown under the second column, **2014-2015 Current YTD Actuals + Commitments** in the VPA report will be as of the period selected.

**Step 6:** Click on **Fetch Report**.