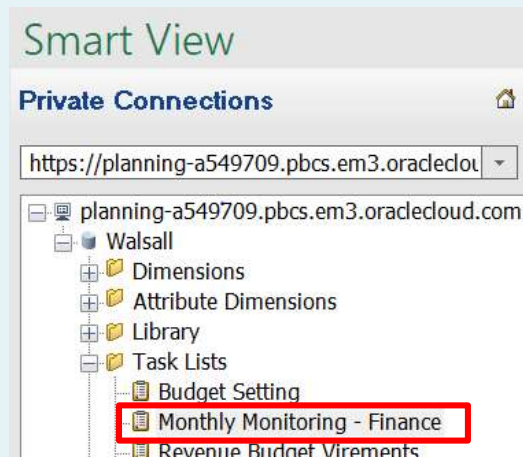


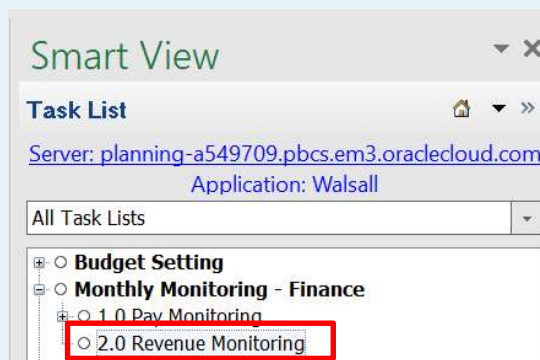
Revenue Monitoring

1

1. Once you have signed into PBCS via Smart View you can access the Revenue Monitoring Form by clicking the Walsall- Task Lists- Monthly Monitoring Finance as shown below:

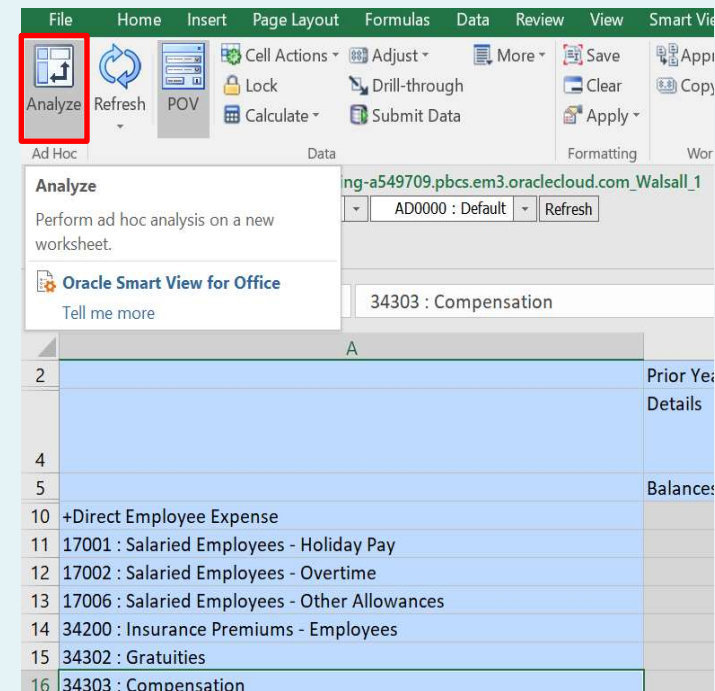


2. Click on Revenue Monitoring to open the form. This is the form you would use to do your monthly forecasting.



2

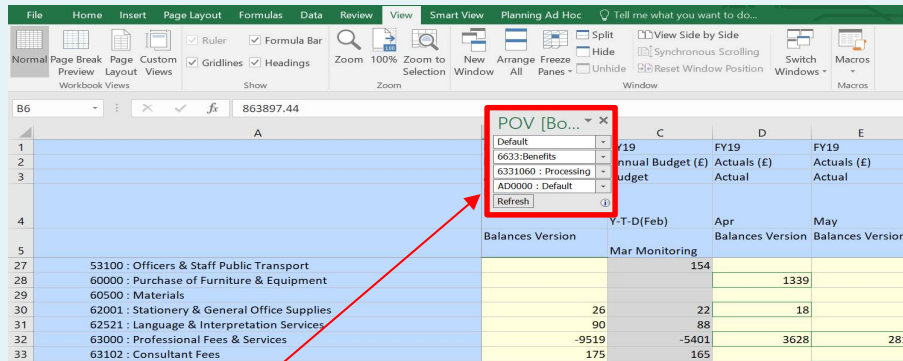
3. The Revenue Monitoring Form will open in Smart View form first. To input information at multiple cost centre level, click **Analyze** located in the planning ribbon to open the form in ad-hoc



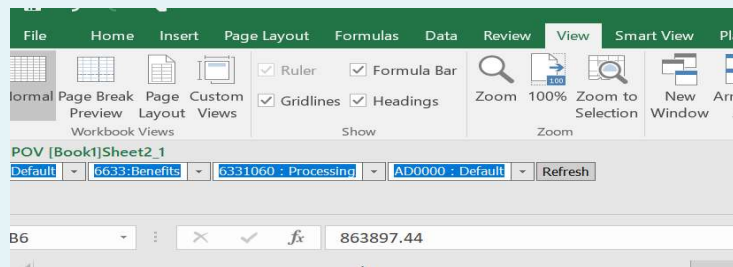
Revenue Monitoring

3

4. The form will open up and look like this



4. Drag the **POV** box underneath the Smart View Ribbon so it looks like the image below



5. You can now create your **Ad-Hoc Grid for revenue monitoring**. Please **DELETE** the following Columns within the spreadsheet:

- 1- Annual Budget YTD, Months and Quarters
- 2- Actuals (Delete all the months and quarters)
- 3- Manual Forecast Months, Quarters and Year Total Column apart from the month you want to input your forecast into e.g. Keep Manual Forecast March to input March's forecast.

4

7. There are 9 columns you need to keep for Revenue Monitoring which are listed below:

- 1- Prior Year Outturn (Actuals)
- 2- Actuals Year Total
- 3- Commitments
- 4- Annual Budget Year Total
- 5- Forecast Profiling
- 6- System Projection Year Total
- 7- Manual Forecast (Relevant Month)
- 8- Final Forecast Year Total
- 9- Comments/ Explanation

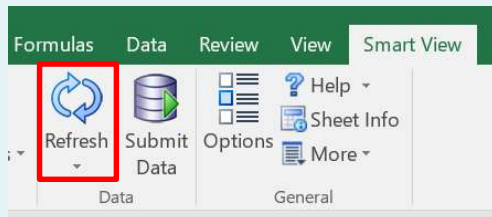
8. The Revenue Ad-hoc Grid should look like the image below:

	E	F	G	H	I	J	K	L	M
1	FY18	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19
2	Prior Year Outturn (£)	Actuals (£)	Commitments (£)	Annual Budget (£)	Forecast Profiling	System Projection (£)	Manual Forecast (£)	Final Forecast (£)	Comments/Explanations
3	Actual	Actual	Actual	Budget	Forecast	Forecast	Forecast	Forecast	Forecast
4	Details	YearTotal		YearTotal		YearTotal		YearTotal	Details
5			Feb		Feb		Mar		
6	Balances Version	Balances Version	Balances Version	Mar Monitoring	Mar Monitoring	Mar Monitoring	Mar Monitoring	Mar Monitoring	Mar Monitoring
7		13652	-13178		13652	Average Of Actuals	-14376		-14376
8		2531	12645		662	Average Of Actuals			
9		14			14	Average Of Actuals			
10			150			Average Of Actuals	164		164
11		135	102		135	Average Of Actuals	111		111
12		34951	28148		35198	Average Of Actuals	30707		30707
13			50			Average Of Actuals	55		55
14			168334			Average Of Actuals	183637		183637
15		7664	7316		4232	Average Of Actuals	7981		7980
16		157	121		170	Average Of Actuals	132		132
17		367			367	Average Of Actuals			
18		12920	12920		39356	Average Of Actuals	14095		14095
19		7			7	Average Of Actuals			

Revenue Monitoring

5

- Click **Refresh** in the Smart View Ribbon to get out of free from mode and ready to input data.



- To bring your data in you need to select your **code combinations** by zooming in and out of the Service Type, Cost Centre and Additional. Please refer to the [Revenue Monitoring Zoom in and Out Quick Reference Guide](#) to carry this out.

- Once you have brought your data into the form at the bottom level, the columns you can **enter information into will appear as yellow**. You can only make changes in the **YELLOW** cells.

	E	F	G	H	I	J	K	L	M
1	FY18	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19
2	Prior Year Outturn (€)	Actuals (€)	Commitments (€)	Annual Budget (€)	Forecast Profiling	System Projection (€)	Manual Forecast (€)	Final Forecast (€)	Comments/Explanations
3	Actual	Actual	Actual	Budget	Forecast	Forecast	Forecast	Forecast	Forecast
4	Details	YearTotal	Feb	YearTotal	Feb	YearTotal	Mar	YearTotal	Details
5	Balances Version	Balances Version	Balances Version	Mar Monitoring	Mar Monitoring	Mar Monitoring	Mar Monitoring	Mar Monitoring	Mar Monitoring
6		13652	-13178		13652 Average Of Actuals		-14376		-14376
7		2531	12645		662 Average Of Actuals				
8		14			14 Average Of Actuals				
9			150		Average Of Actuals		164		164
10		135	102		135 Average Of Actuals		111		111
11		34951	28148		35198 Average Of Actuals		30707		30707
12			50		Average Of Actuals		55		55
13			168334		Average Of Actuals		183637		183637
14		7664	7316		4232 Average Of Actuals		7981		7980
15		157	121		170 Average Of Actuals		132		132
16		367			367 Average Of Actuals				
17		12920	12920		39356 Average Of Actuals		14095		14095
18		7			7 Average Of Actuals				

6

- The three columns you should be able to edit into are:

- Forecast Profiling
- Manual Forecast (Relevant Month)
- Comments/ Explanation

- Once you have made adjustments to forecast, click '**Submit Data**' to save changes. You may need to click '**Refresh**' before starting.

- Once changes are submitted you will need to run a rule to update the forecast calculations. (Please refer to **Revenue Monitoring Business Rule** guide)
- Click **Refresh** once the rule has been run successfully to see the forecast calculations updated.

PLEASE NOTE: ANY DIRECT EMPLOYEE SUBJECTIVES CANNOT BE UPDATED IN REVENUE MONITORING. THESE CHANGES WILL NEED TO BE MADE IN THE PAY MONITORING FORM. ALL PAY INFORMATION IS PULLED DIRECTLY FROM THE HR/PAYROLL SYSTEM.

Further Support If you have any further queries, please contact the **One Source helpdesk** on **01922 654320**.