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REPORT USER GUIDE

For Peer Assessors

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REPORTS OVERVIEW

The *Reports* section of CADAC allows users to run reports on data drawn from organizations included within their agency's program lists. Using the reports, users can:

- have access to historical data anytime
- analyze financial and statistical data to identify trends
- access national aggregate financial and statistical data

Public reports show aggregate data from all organizations within CADAC. With these public reports, users can compare their data to aggregate data of other organizations.

To protect confidentiality of information, aggregate data is only available when data can be drawn from five or more organizations. This ensures that the aggregate data cannot be identified with specific organizations.

HOW TO USE THE REPORTS

CORE FUNCTIONALITY

Report – List

For ease of navigation, convenient access to multiple reports is available inside a single reporting view. Each report has an **Available Reports** bar situated on the left (Figure 1).

Figure 1 - Report Layout

The screenshot displays a report interface with a sidebar on the left containing 'Available Reports' and 'Filters'. The main content area is divided into several sections:

- Report - Summary / Report - Detailed** (Tabs)
- Organization Details** (Table)
- Financial Form by Organization** (Table)
- Financial Form - Calculations** (Table)
- Statistical Form by Organization** (Table)
- Statistical Form - Calculations** (Table)

Organization Details Table:

	hacked-org	Nini Gik.	testorg1	testorg10	testorg2	testorg3
CADAC ID	TES2311574	TES1715086	TES5050853	TES2465748	TES6266712	TES7411483
Financial Form Status	Submitted	Submitted	Submitted	Submitted	Re-Submitted	Submitted
Discipline	Literary Arts	Media Arts	Contemporary Circus Arts	Visual Arts	Dance	History Museums-Heritage
Specialization	Literary Arts - Publisher	Not Applicable				History Museums-Heritage
Practice	Not applicable	Not applicable, Indigenous Arts Activities	Not applicable	Not applicable	Not applicable	Not applicable
Province / Territory	NL	NS	AB	SK	BC	ON
City / Town / Reserve	hacked city	Toronto	Calgary	saskatoon	Vancouver	Greater Sudbury
Partial Postal Code	K1P	M5T	K1P	K1P	K1P	P3C
FY End Month	May	June	January	October	February	October

Financial Form by Organization Table:

Organization Legal Name	hacked-org	Nini Gik.	testorg1	testorg10	testorg2	testorg3	testorg4	testorg5
4175 - Total Earned Revenue	\$5.00	\$82.00	\$435.00	\$130.00	\$31.00	\$39.00	\$56.00	
4210 - Total Net Investment Income	\$0.00	\$6.00	\$1.00	\$10.00	\$2.00	\$3.00	\$4.00	
4345 - Total Private Sector Revenue	\$0.00	\$42.00	\$7.00	\$70.00	\$412.00	\$21.00	\$28.00	
4440 - Total federal public revenues	\$0.00	\$24.00	\$25,003.00	\$40.00	\$22,006.00	\$12.00	\$16.00	
4500 - Total provincial or territorial public revenues	\$0.00	\$42.00	\$7.00	\$60.00	\$14.00	\$21.00	\$28.00	
4535 - Total municipal or regional public revenues	\$1.00	\$12.00	\$2.00	\$20.00	\$4.00	\$6.00	\$8.00	
4550 - Total Public Sector Revenues	\$1.00	\$84.00	\$25,013.00	\$120.00	\$22,026.00	\$42.00	\$56.00	
4615 - Total Other Revenues	\$0.00	\$12.00	\$2.00	\$20.00	\$4.00	\$6.00	\$8.00	

Financial Form - Calculations Table:

Line Number and Description	% of Total	Total	Mean - based on the "total number of Orgs in the pool"	Mean - based on the "number of Orgs with amount/value excluding zero"
4175 - Total Earned Revenue	2.19%	\$1,090.00	\$109.00	\$109.00
4210 - Total Net Investment Income	0.10%	\$50.00	\$5.00	\$5.56
4345 - Total Private Sector Revenue	1.50%	\$748.00	\$74.80	\$83.11
4440 - Total federal public revenues	94.76%	\$47,197.00	\$4,719.70	\$5,244.11

Statistical Form by Organization Table:

Organization Legal Name	testorg10
1380 - Total Number of Film / Video / Media Screenings	2.00
1435 - Total Number of Public Activities	2.00
1635 - Total Attendance at Film / Video / Media Screenings	10.00
1705 - Total Attendance/ Participants	10.00
2425 - Total Number of Volunteers	2.00

Statistical Form - Calculations Table:

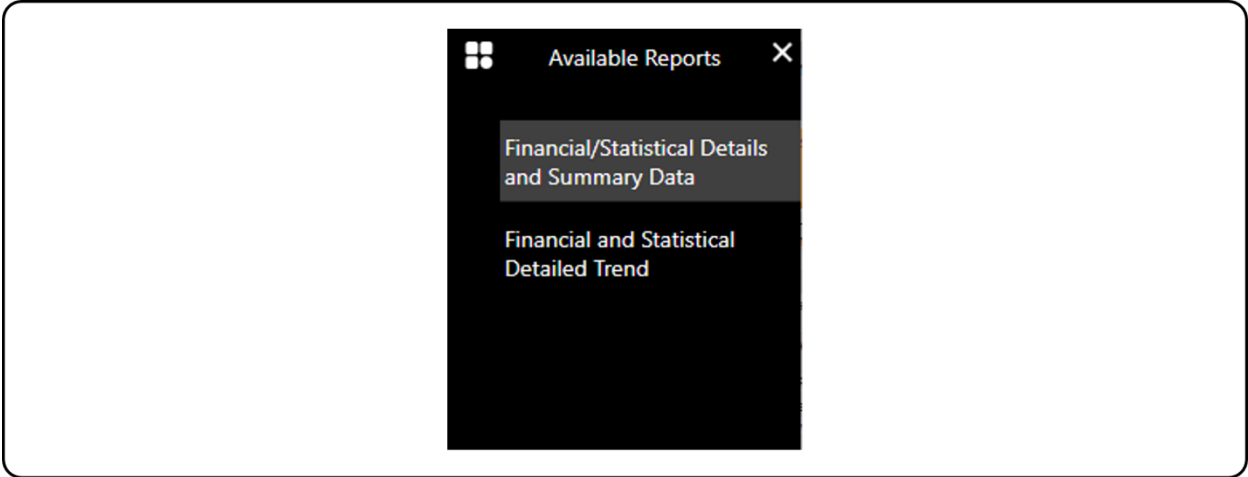
Line Number and Description	Total	Mean - based on the "total number of Orgs in the pool"	Mean - based on the "number of Orgs with amount/value excluding zero"	Median - based on the number of Orgs in the pool
1130 - Total number of public performances and literary readings produced by your organization and toured				
1140 - Total Number of Public Performances and Literary Readings produced by your organization				

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Click anywhere on the bar and it will open the **Available Reports** panel to show the available reports (Figure 2). You can navigate to different reports using this panel.

To close any of the panel, click on the **X** button.

Figure 2 - Available Reports Panel



Filters

Each report has a **Filters** bar situated on the left, next to the **Available Reports** bar (Figure 1). Click anywhere on that bar and it will open the **Filters** panel to show the available filters (Figure 3). Some reports have additional filters that can be accessed by clicking on the **More Filters** button (Figure 3). To close any of the panels, click on the **X** button.

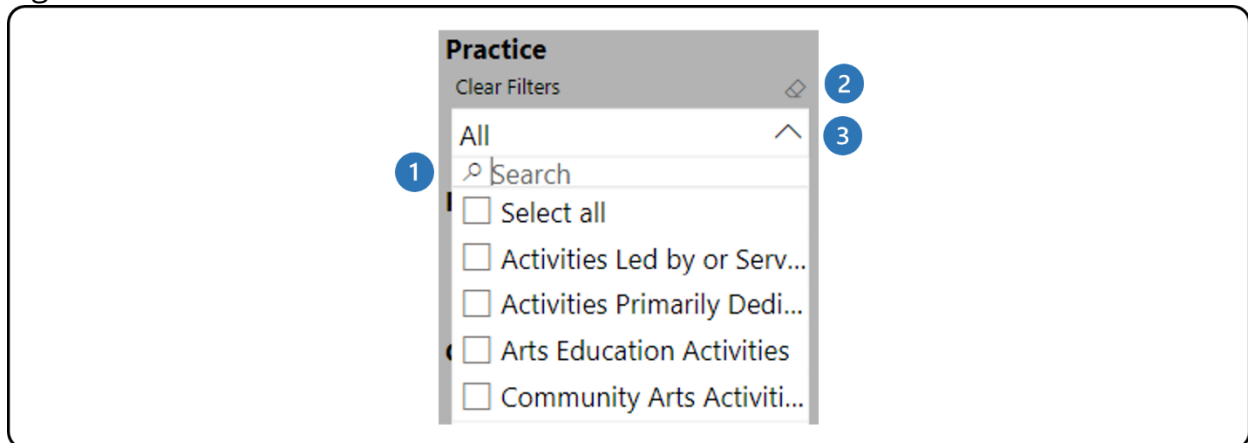
Figure 3 - Filters Panel and More Filters Panel



- 1 This shows how many organizations have financial and statistical data. It automatically updates as filters are applied.
- 2 This shows which filters have been selected.
- 3 This button will open the **More Filters** panel. This button is available in reports with additional filters.
- 4 This button clears all filters that have been applied.
- 5 This button will close the **More Filters** panel.

The **Filters** panel contains filters that allow you to adjust the data (Figure 4). Some filters will allow you to select multiple options and some will only allow you to select one option at a time.

Figure 4 - Filter



- 1 The search box allows you to search through the list of available values by typing in the value you are searching for.
- 2 The eraser icon clears any of the selections you have made in that filter.
- 3 Click on the arrow to close the drop-down list.

Note: The **Clear Filters** button does not clear any search entries in the search bar of the filters. The search entry must be manually removed by clicking on the eraser icon in the top right corner of the filter.

Tables

The tables in the report can be sorted by any of the columns in the table. This can be done in two ways. The first way is to click on the column header to sort the data by that column. When the table is sorted by that column, the column header shows a black arrow (Figure 5).

Figure 5 - Table Sort by Column Header

Financial Form		
Line Number and Description	QA Test Org 01	sktestdec05OrgSuper test Corp.
4175- Total Earned Revenue	\$11	\$444,444
4210- Total Net Investment Income	\$0	\$0
4345- Total Private Sector Revenue	\$0	\$0
4440- Total federal public revenues	\$0	\$0
4500- Total provincial or territorial public revenues	\$0	\$0
4535- Total municipal or regional public revenues	\$0	\$0
4550- Total Public Sector Revenues	\$0	\$0
4615- Total Other Revenues	\$0	\$0
4617 - Total Operating Revenues (A)	\$11	\$444,444

Another way to sort the table data is to click on the **More options** icon in the top right corner. In the menu that appears, click on **Sort by** and choose the desired field for sorting (Figure 6).

Figure 6 - Table Sort by More Options

er test Corp.	WHY NOT THEA
\$0	\$4
\$0	\$74
\$0	
\$444,444	\$2,54
\$444,444	\$2,54
\$0	\$2,22
\$0	\$11
\$0	\$14
amount	4,052
\$0	\$2,714,052

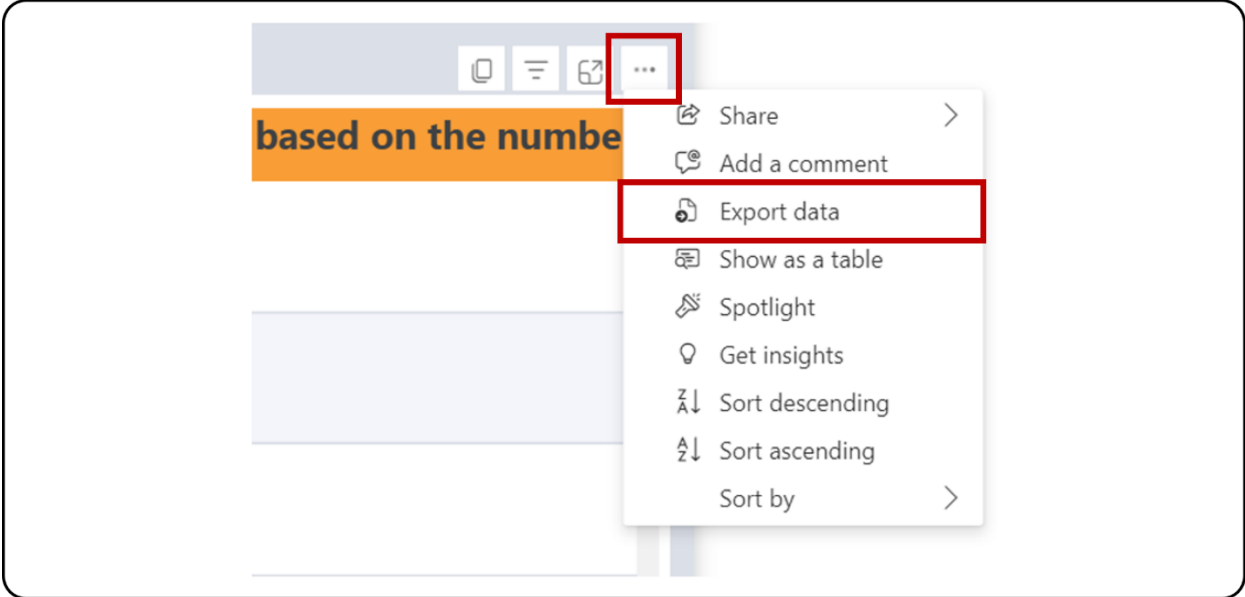
To remove the sorting, click on the **More Options** icon in the top right corner, then **Sort by** and select the field that is sorted, which will have a check mark next to it (Figure 6).

Exporting Data

The first step is to prepare your data for export by working with the report and applying the necessary filters. Note that you can export data individually for each

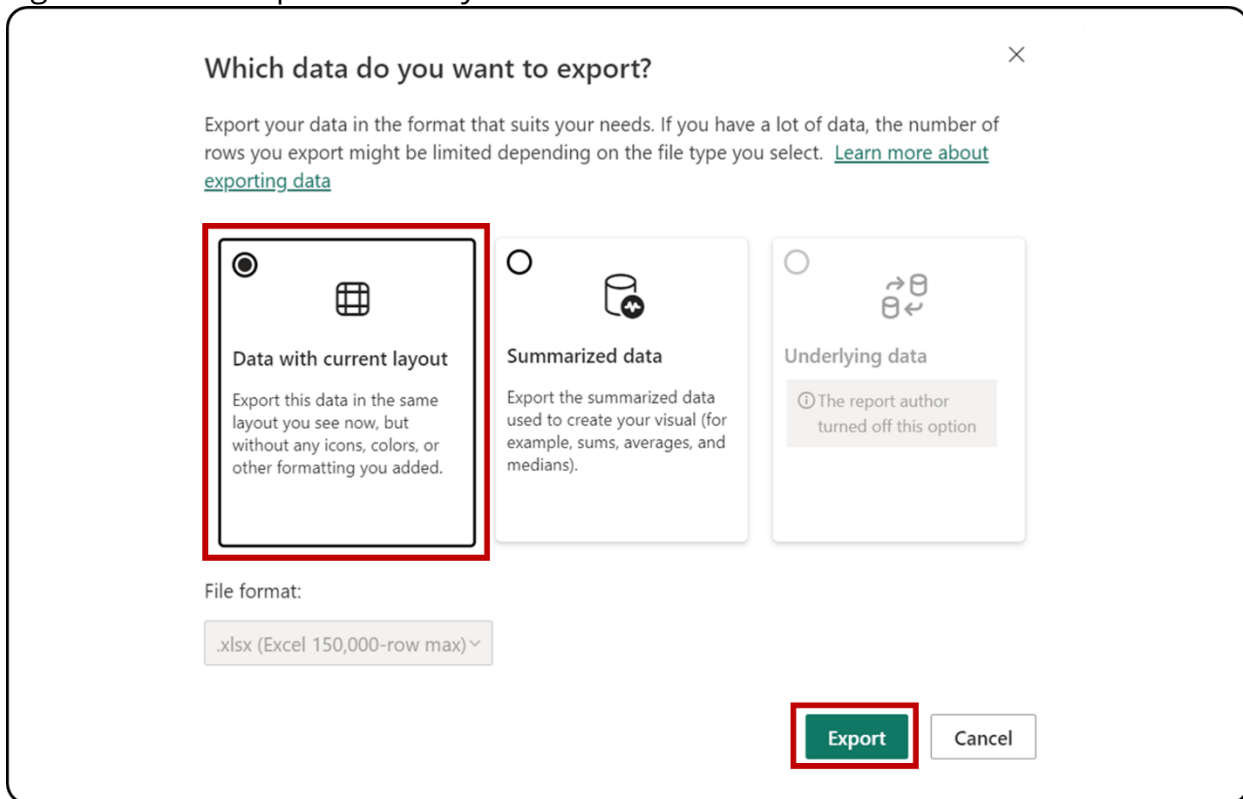
table in the report. Once the table displays the necessary information, click on the **More options** icon in the top right corner. In the menu that appears, click on **Export Data** (Figure 7).

Figure 7 - Table Export Data



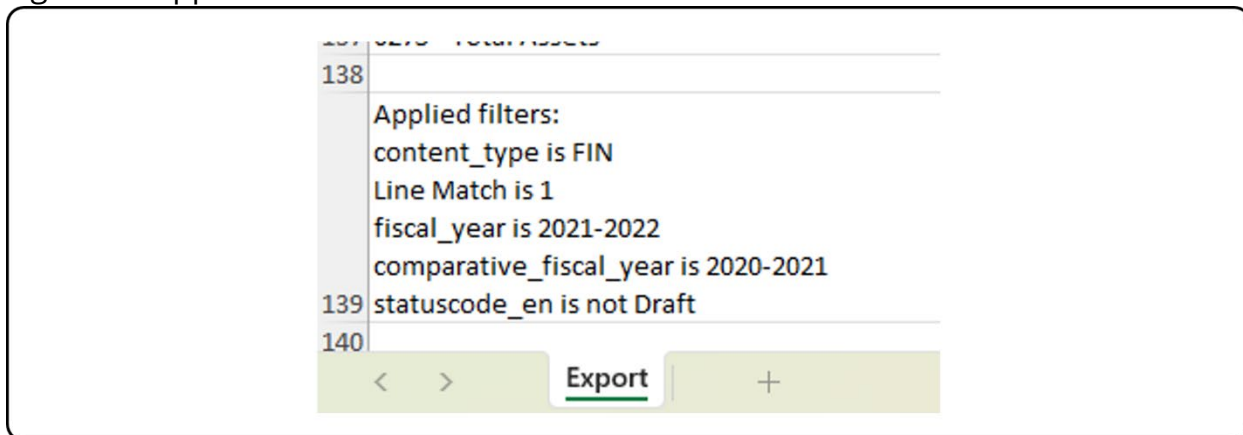
On the page that appears, select the **Data with current layout** option, then click **Export** (Figure 8). Only tables can be exported with the **Data with current layout** option in PowerBI. Exporting charts will only be through Summarized data, which means that the data used for the chart, and not the chart itself, will be exported in Excel.

Figure 8 - Table Export Data Layout Selection



The Excel file with the exported data will show which filters were applied to the table at the bottom of the sheet (Figure 9).

Figure 9 - Applied Filters



Note: The export limitation in PowerBI is 150,000 data intersections. For the tables, each row can have 1 or more data intersections, so the exported rows count can be less than 150,000 (i.e., if the table has three data intersections per row, the

maximum row count will be $150,000 / 3 = 50,000$ rows). The message “Exported data exceeded the allowed volume. Some data may have been omitted.” will appear at the footer of the Excel file when the limit is hit. Consider filtering the data to avoid this situation.

FINANCIAL/STATISTICAL DETAILS AND SUMMARY DATA

ABOUT THE REPORT

The *Financial/Statistical Details and Summary* report is comprised of two components: the Financial & Statistical Details and the Financial & Statistical Summary. Each component shows data from organizations based on the filters applied for one fiscal year.

The difference between the Financial/Statistical Details and the Financial/ Statistical Summary is that the details component shows every line from the financial and statistical forms, while the summary component only shows sub-total lines from the financial and statistical forms.

REPORT DETAILS

The *Financial/Statistical Details and Summary* report shows the Details and Summary sections as well as disaggregated and aggregated data for organizations within specific program lists for peer assessment purposes for a selected fiscal year (Figure 10).

Figure 10 - Report Layout

The screenshot displays a report interface with the following sections and callouts:

- 1**: Available Reports bar (vertical sidebar)
- 2**: Filters bar (vertical sidebar)
- 3**: Report - Summary / Report - Detailed tabs
- 4**: Organization Details table
- 5**: Financial Form by Organization table
- 6**: Financial Form - Calculations table
- 7**: Statistical Form by Organization table
- 8**: Statistical Form - Calculations table
- 9**: Last Refreshed: 03/17/2023 01:27:15 PM
- 10**: Cell in the 'Financial Form - Calculations' table (94.76%)

- 1 This is the **Available Reports** bar. Clicking on it will open the list of available reports so you can navigate between reports.
- 2 This is the **Filters** bar. Clicking on it will open the panel with all available filters. There is a **More Filters** button that will open a panel with additional filters.

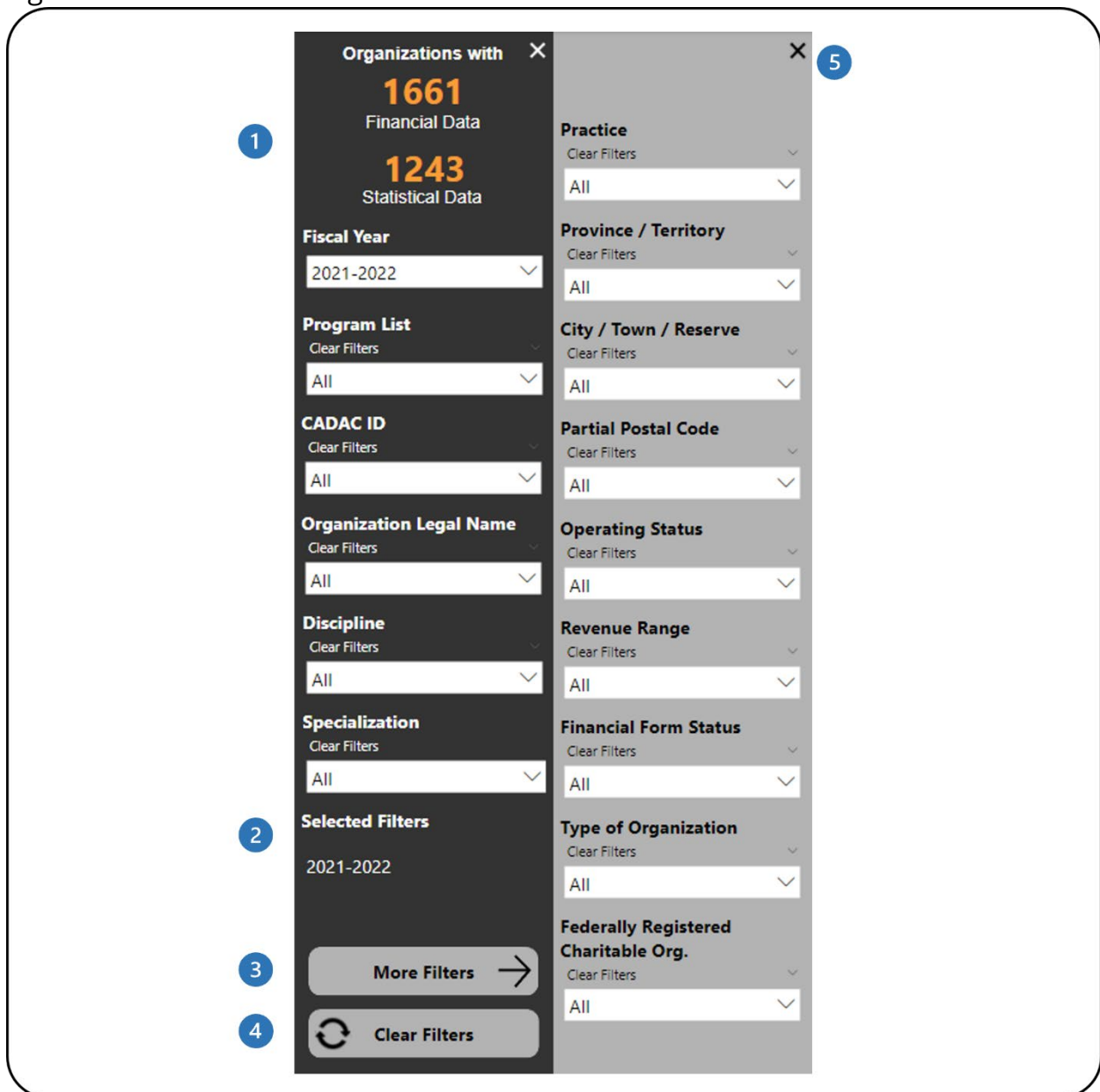
- 3 There are two tabs – one for **Report – Summary** which shows only sub-total lines in the financial and statistical forms and one for **Report – Detailed** which shows all lines in the financial and statistical forms.
- 4 This is the **Organization Details** table that shows general information about organizations such as CADAC ID and Discipline.
- 5 This is the **Financial Form by Organization** table that shows the financial form data for organizations.
- 6 This is the **Financial Form - Calculations** table that shows various calculations using the financial form data. Additional information on the calculations is available in the [Legend](#) section of this document.
- 7 This is the **Statistical Form by Organization** table that shows the statistical form data for organizations.
- 8 This is the **Statistical Form - Calculations** table that shows various calculations using statistical form data. Additional information on the calculations is available in the [Legend](#) section of this document.
- 9 This shows when the data was last refreshed.
- 10 All revenue line percentages are in comparison to the total revenues (line 4700). All expense line percentages are in comparison to the total expenses (line 5600). The other line percentages are calculated as follow:

6000	SURPLUS OR (DEFICIT)	
6040	Totals excluding amortization and other adjustments	% of Total
6050	Total Operating Revenues (A)	Compared to 4700
6055	Total Operating Expenses (B)	Compared to 4700
6060	Operating Surplus or (deficit) for the year (A-B)	Compared to 4700
6090	Totals including amortization and other adjustments	
6100	Total Revenues (C)	Compared to 4700
6105	Total Expenses (D)	Compared to 4700
6110	Surplus or deficit (including amortization) for the year before interfund transfers (C) - (D)	Compared to 4700
6125	Other adjustment items affecting surplus or (deficit), including Income Tax (for-profit organizations only)	Compared to 4700
6130	Surplus or (deficit) before transfers for the year	Compared to 4700
6135	Interfund transfers	Compared to 4700
6140	Surplus or (deficit) for the year (C)	Compared to 4700
6200	ACCUMULATED SURPLUS OR (DEFICIT)	
6205	Accumulated surplus or (deficit), beginning of year	Compared to 4700
6206	Prior year adjustment and/or direct transaction to the equity (owner's withdrawals, bequest)	Compared to 4700

6210	Surplus or (deficit) for the year (C)	Compared to 4700
6215	Accumulated surplus or (deficit), end of year	Compared to 4700
6250	STATEMENT OF FINANCIAL POSITION / BALANCE SHEET-(INFORMATION FROM FINANCIAL STATEMENTS - ACTUALS ONLY)	
6255	Assets	
6260	Current assets	Compared to 6275
6265	Capital / fixed assets	Compared to 6275
6270	Other assets (please add some details)	Compared to 6275
6275	<i>Total Assets</i>	Compared to 4700
6280	Liabilities and net assets	
6285	Liabilities	
6290	Current liabilities	Compared to 6300
6295	Other liabilities (please add some details)	Compared to 6300
6300	Total Liabilities	Compared to 4700
6305	Net Assets	
6310	Unrestricted net assets	Compared to 4700
6315	Invested in Capital / fixed assets	Compared to 4700
6320	Internally designated or restricted funds	Compared to 4700
6325	Cash reserves (Alberta organizations only)	Compared to 4700
6330	Externally designated or restricted funds	Compared to 4700
6335	Other net assets (please add some details)	Compared to 4700
6340	Total Net Assets	Compared to 4700
6345	Total Liabilities and Net Assets	Compared to 4700
6355	Working capital	Compared to 4700

The report has many categories that can be filtered. Open the **Filters** panel for all the available filters (Figure 11). Details on the **Filters** panel can be found in the [Filters](#) section of this document.

Figure 11 - Filters Panel for Peer Assessors



- 1 This shows how many organizations have financial and statistical data. It automatically updates as filters are applied.
- 2 This shows which filters have been selected.
- 3 This button will open the **More Filters** panel. This button is available in reports with additional filters.
- 4 This button clears all filters that have been applied.
- 5 This button will close the **More Filters** panel.

FINANCIAL AND STATISTICAL DETAILED TREND

ABOUT THE REPORT

The Financial and Statistical Detailed Trend report shows the financial and statistical line details for two years or more. Users can filter by lines, program list, and CADAC ID. Peer Assessors have access to organizations within specific program lists for peer assessment purposes.

REPORT DETAILS

The Financial and Statistical Detailed Trend report allows you to look at financial and statistical line details for multiple years in both table and chart formats (Figure 12).

Figure 12 - Report Layout

The screenshot displays a report interface with the following components:

- 1 Available Reports:** A vertical bar on the left side of the interface.
- 2 Filters:** A vertical bar on the left side, adjacent to the Available Reports bar.
- 3 Report - Detailed / Report - Chart View:** Tabs at the top of the report content area.
- 4 Financial Form by Organization:** A table showing financial data for 'hacked-org' and 'Nini Gik.' across years 2018-2019 to 2020-2021.
- 5 Financial Form - Calculations:** A table showing calculated financial values for the same organizations and years.
- 6 Statistical Form by Organization:** A table showing statistical data for 'hacked-org', 'Nini Gik.', and other organizations across years 2019-2020 to 2022-2023.
- 7 Statistical Form - Calculations:** A table showing calculated statistical values for the same organizations and years.

- 1 This is the **Available Reports** bar. Clicking on it will open the list of available reports so you can navigate between reports.
- 2 This is the **Filters** bar. Clicking on it will open the panel with all available filters.
- 3 These are the **Report - Detailed** and **Report - Chart View** tabs which shows all/filtered lines in the financial and statistical forms in tables and charts.
- 4 This is the **Financial Form by Organization** table that shows the financial form line details for multiple years by organization.

- 5 This is the **Financial Form - Calculations** that shows aggregated financial line values by fiscal year.
- 6 This is the **Statistical Form by Organization** table that shows the statistical form line details for multiple years by organization.
- 7 This is the **Statistical Form - Calculations** that shows aggregated statistical line values by fiscal year.

The **Report - Chart View** tab has two different sets of charts. One set shows individual line values for financial and statistical forms (Figure 13). The other set shows total including and excluding amortization and other adjustments from financial forms (Figure 14). For the two different sets of charts, users can choose between viewing a line chart or a bar chart.

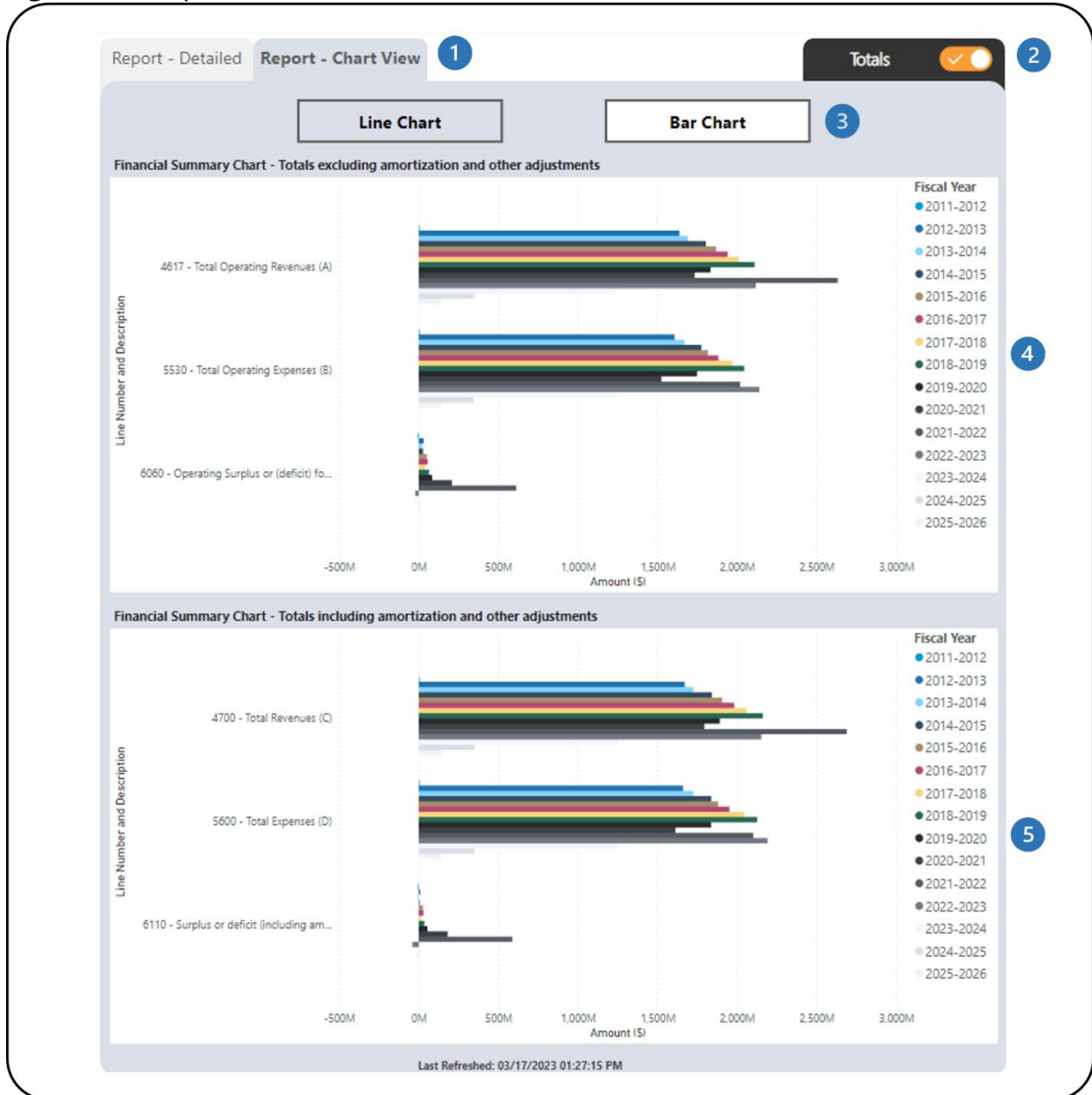
Figure 13 - Report - Chart View with Individual Line Values



- 1 These are the **Report - Detailed** and **Report - Chart View** tabs which shows all/filtered lines in the financial and statistical forms in tables and charts.
- 2 This is the **Totals** tab. Clicking on it will navigate to the charts with totals from the financial form.
- 3 The two chart types available are **Line Chart** and **Bar Chart**.
- 4 This is the **Financial Summary Chart**. It shows all/filtered financial lines in a line chart to see the trend through the years.

- 5 This is the **Statistical Summary Chart**. It shows all/filtered statistical lines in a line chart to see the trend through the years.

Figure 14 - Report - Chart View with Totals



- 1 These are the **Report - Detailed** and **Report - Chart View** tabs which shows all/filtered lines in the financial and statistical forms in tables and charts.
- 2 This is the **Totals** tab. Clicking on it will navigate to the charts with individual line values.

- 3 The two chart types available are **Line Chart** and **Bar Chart**.
- 4 This is the **Financial Summary Chart** that shows totals excluding amortization and other adjustments from the financial form (lines 4617, 5530, 6060). Filtering the financial lines will not affect the chart.
- 5 This is the **Financial Summary Chart** that shows totals including amortization and other adjustments from the financial form (lines 4700, 5600, 6110). Filtering the financial lines will not affect the chart.

The report has several filters. Open the **Filters** panel for all the available filters (Figure 15). Details on the **Filters** panel can be found in the [Filters](#) section of this document.

Figure 15 - Filters Panel and More Filters Panel



- 1 This shows how many organizations have financial and statistical data. It automatically updates as filters are applied.
- 2 This is the fiscal year filter. Multiple fiscal years can be selected. The default state is all fiscal years.
- 3 This is the financial lines filter. Multiple lines can be selected. The default state is all lines.

- 4 This is the statistical lines filter. Multiple lines can be selected. The default state is all lines.
- 5 This shows which filters have been selected.
- 6 This button will open the **More Filters** panel. This button is available in reports with additional filters.
- 7 This button clears all filters that have been applied.
- 8 This button will close the **More Filters** panel.

COMPARISON OF FINANCIAL AND STATISTICAL DETAILS

ABOUT THE REPORT

The Comparison of Financial & Statistical Details report shows the data for financial and statistical lines between two fiscal years. Users can compare the data based on the filters selected. Peer Assessors have access to organizations within specific program lists for peer assessment purposes.

REPORT DETAILS

The Comparison of Financial and Statistical Details report allows users to look at and compare the financial and statistical data of a group of organizations, a specific organization, or a specific program list (Figure 16).

Figure 16 - Report Layout

Report - Detailed

Financial Form by Organization

Fiscal Year	2020-2021											
Organization Legal Name	hacked-org	Nini Gik.	testorg1	testorg10	testorg2	testorg3						
CADAC ID	TES2311574	TES1715086	TESS050853	TES2465748	TES6266712	TES741148						
Line Number and Description	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%	Amount	%
4105 - Production admissions and box office from subscriptions / admissions membership or group admissions	\$5.00		\$10.00	4.20%	\$180.00	0.71%	\$10.00	2.82%	\$5.00	0.02%	\$3.00	
4110 - Production admissions and box office from single ticket sales	\$0.00	0.00%	\$6.00	2.52%	\$20.00	0.08%	\$10.00	2.82%	\$2.00	0.01%	\$3.00	
4115 - Co-productions	\$0.00	0.00%	\$6.00	2.52%	\$225.00	0.88%	\$10.00	2.82%	\$2.00	0.01%	\$3.00	
4120 - Touring revenue / exhibition rental	\$0.00	0.00%	\$6.00	2.52%	\$1.00	0.00%	\$10.00	2.82%	\$2.00	0.01%	\$3.00	
4125 - Presenting / hosting admissions and box office	\$0.00	0.00%	\$6.00	2.52%	\$1.00	0.00%	\$10.00	2.82%	\$2.00	0.01%	\$3.00	

Financial Form - Calculations

Fiscal Year	2020-2021			
Line Number and Description	% of Total	Total	Mean - based on the "total number of Orgs in the pool"	Mean - based on the "number of Orgs with amount/value excluding zero"
4105 - Production admissions and box office from subscriptions / admissions membership or group admissions	8%	\$241.00		\$24.10
4110 - Production admissions and box office from single ticket sales	0.14%	\$69.00		\$6.90
4115 - Co-productions	0.55%	\$274.00		\$27.40
4120 - Touring revenue / exhibition rental	0.10%	\$50.00		\$5.00
4125 - Presenting / hosting admissions and box office	0.10%	\$50.00		\$5.00
4130 - Distribution revenue (media arts)	0.10%	\$50.00		\$5.00
4135 - Fees - guarantees (local market)	0.10%	\$50.00		\$5.00

Statistical Form by Organization

Fiscal Year	2020-2021	
Organization Legal Name	testorg10	
Line Number and Description	TES2465748	
1360 - Number of film / video / media screenings programmed by your organization in your city / town / reserve	2.00	
1380 - Total Number of Film / Video / Media Screenings	2.00	
1435 - Total Number of Public Activities	2.00	
1605 - Attendance at film / video / media screenings programmed by your organization in your city / town / reserve	10.00	
1635 - Total Attendance at Film / Video / Media Screenings	10.00	

Statistical Form - Calculations

Fiscal Year	2020-2021			
Line Number and Description	Total	Mean - based on the "total number of Orgs in the pool"	Mean - based on the "number of Orgs with amount/value excluding zero"	Median - based on the "number of Orgs with amount/value excluding zero"
1110 - Number of public performances and literary readings produced by your organization and presented in your city / town / reserve				
1112 - Number of public performances and literary readings where your organization is presented by another organization in your city / town / reserve				
1115 - Number of public performances and literary readings produced by your organization and toured in your province/territory not included on line 1110				

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- 1 This is the **Available Reports** bar. Clicking on it will open the list of available reports so you can navigate between reports.
- 2 This is the **Filters** bar. Clicking on it will open the panel with all available filters.
- 3 This is the **Financial Form by Organization** table that shows the financial form data for organizations.

- 4 This is the **Financial Form - Calculations** table that shows various calculations using the financial form data. Additional information on the calculations is available in the [Legend](#) section of this document.
- 5 This is the **Statistical Form by Organization** table that shows the statistical form data for organizations.
- 6 This is the **Statistical Form - Calculations** table that shows various calculations using statistical form data. Additional information on the calculations is available in the [Legend](#) section of this document.
- 7 In the **%** column, all revenue line percentages are in comparison to the total revenues of the organization (line 4700). All expense line percentages are in comparison to the total expenses (line 5600). The other line percentages are calculated as follow:

6000	SURPLUS OR (DEFICIT)	
6040	Totals excluding amortization and other adjustments	% of Total
6050	Total Operating Revenues (A)	Compared to 4700
6055	Total Operating Expenses (B)	Compared to 4700
6060	Operating Surplus or (deficit) for the year (A-B)	Compared to 4700
6090	Totals including amortization and other adjustments	
6100	Total Revenues (C)	Compared to 4700
6105	Total Expenses (D)	Compared to 4700
6110	Surplus or deficit (including amortization) for the year before interfund transfers (C) - (D)	Compared to 4700
6125	Other adjustment items affecting surplus or (deficit), including Income Tax (for-profit organizations only)	Compared to 4700
6130	Surplus or (deficit) before transfers for the year	Compared to 4700
6135	Interfund transfers	Compared to 4700
6140	Surplus or (deficit) for the year (C)	Compared to 4700
6200	ACCUMULATED SURPLUS OR (DEFICIT)	
6205	Accumulated surplus or (deficit), beginning of year	Compared to 4700
6206	Prior year adjustment and/or direct transaction to the equity (owner's withdrawals, bequest)	Compared to 4700
6210	Surplus or (deficit) for the year (C)	Compared to 4700
6215	Accumulated surplus or (deficit), end of year	Compared to 4700
6250	STATEMENT OF FINANCIAL POSITION / BALANCE SHEET -(INFORMATION FROM FINANCIAL STATEMENTS - ACTUALS ONLY)	
6255	Assets	
6260	Current assets	Compared to 6275
6265	Capital / fixed assets	Compared to 6275
6270	Other assets (please add some details)	Compared to 6275

6275	Total Assets	Compared to 4700
6280	Liabilities and net assets	
6285	Liabilities	
6290	Current liabilities	Compared to 6300
6295	Other liabilities (please add some details)	Compared to 6300
6300	Total Liabilities	Compared to 4700
6305	Net Assets	
6310	Unrestricted net assets	Compared to 4700
6315	Invested in Capital / fixed assets	Compared to 4700
6320	Internally designated or restricted funds	Compared to 4700
6325	Cash reserves (Alberta organizations only)	Compared to 4700
6330	Externally designated or restricted funds	Compared to 4700
6335	Other net assets (please add some details)	Compared to 4700
6340	Total Net Assets	Compared to 4700
6345	Total Liabilities and Net Assets	Compared to 4700
6355	Working capital	Compared to 4700

- 8 In the **% of Total** column, all revenue line percentages are in comparison to the total revenues (line 4700). All expense line percentages are in comparison to the total expenses (line 5600). The other line percentages are calculated as shown in the table above.
- 9 This shows when the data was last refreshed.

The report has several filters. Open the **Filters** panel for all the available filters (Figure 17). Details on the **Filters** panel can be found in the [Filters](#) section of this document.

Figure 17 - Filters Panel for Peer Assessors



- 1 This shows how many organizations have financial and statistical data. It automatically updates as filters are applied.
- 2 This shows which filters have been selected.
- 3 This button will open the **More Filters** panel. This button is available in reports with additional filters.
- 4 This button clears all filters that have been applied.
- 5 This button will close the **More Filters** panel.

LEGEND

DESCRIPTIVE STATISTICS FOR AGGREGATED DATA

% and % of Total

All revenue line percentages are in comparison to the total revenues (line 4700). All expense line percentages are in comparison to the total expenses (line 5600). The other line percentages are calculated as follow:

6000	SURPLUS OR (DEFICIT)	
6040	Totals excluding amortization and other adjustments	% of Total
6050	Total Operating Revenues (A)	Compared to 4700
6055	Total Operating Expenses (B)	Compared to 4700
6060	Operating Surplus or (deficit) for the year (A-B)	Compared to 4700
6090	Totals including amortization and other adjustments	
6100	Total Revenues (C)	Compared to 4700
6105	Total Expenses (D)	Compared to 4700
6110	Surplus or deficit (including amortization) for the year before interfund transfers (C) - (D)	Compared to 4700
6125	Other adjustment items affecting surplus or (deficit), including Income Tax (for-profit organizations only)	Compared to 4700
6130	Surplus or (deficit) before transfers for the year	Compared to 4700
6135	Interfund transfers	Compared to 4700
6140	Surplus or (deficit) for the year (C)	Compared to 4700
6200	ACCUMULATED SURPLUS OR (DEFICIT)	
6205	Accumulated surplus or (deficit), beginning of year	Compared to 4700
6206	Prior year adjustment and/or direct transaction to the equity (owner's withdrawals, bequest)	Compared to 4700
6210	Surplus or (deficit) for the year (C)	Compared to 4700
6215	Accumulated surplus or (deficit), end of year	Compared to 4700
6250	STATEMENT OF FINANCIAL POSITION / BALANCE SHEET-(INFORMATION FROM FINANCIAL STATEMENTS - ACTUALS ONLY)	
6255	Assets	
6260	Current assets	Compared to 6275
6265	Capital / fixed assets	Compared to 6275
6270	Other assets (please add some details)	Compared to 6275
6275	<i>Total Assets</i>	Compared to 4700
6280	Liabilities and net assets	
6285	Liabilities	
6290	Current liabilities	Compared to 6300
6295	Other liabilities (please add some details)	Compared to 6300

6300	Total Liabilities	Compared to 4700
6305	Net Assets	
6310	Unrestricted net assets	Compared to 4700
6315	Invested in Capital / fixed assets	Compared to 4700
6320	Internally designated or restricted funds	Compared to 4700
6325	Cash reserves (Alberta organizations only)	Compared to 4700
6330	Externally designated or restricted funds	Compared to 4700
6335	Other net assets (please add some details)	Compared to 4700
6340	Total Net Assets	Compared to 4700
6345	Total Liabilities and Net Assets	Compared to 4700
6355	Working capital	Compared to 4700

Total

The total for each line number for all organizations in the pool (based on the filters applied).

For each of the descriptive statistics below, there are two versions:

- Statistics 1 based on the total number of Orgs in the pool – this is calculated using all values from the Orgs in the pool
- Statistics 2 based on the number of Orgs with amount/value excluding zero – this is calculated by excluding values of zero from the Orgs in the pool

Mean (Average)

The most common measure of central tendency (the location of the middle of a distribution), the mean is the arithmetic average of a set of numbers.

Median

The value of the middle item when the data are arranged from lowest to highest; another measure of central tendency. If there is an even number of observations, the median is the average of the two middle observations.

Standard Deviation

Standard deviation measures the spread or distribution around the mean of a data set. It is the most widely used measure of spread.

Percentile 25

Percentile 25 refers to the 25th percentile or lower quartile of a data set. It is the value at which 25% of line number amounts lie at or below that value (inclusive of range).

Percentile 75

Percentile 75 refers to the 75th percentile or upper quartile of a data set. It is the value at which 75% of line number amounts lie at or below that value (inclusive of range).

Min

Min, or minimum, is the smallest value in a data set.

Max

Max, or maximum, is the largest value for in a data set.

Range Max minus Min

Range is the spread of a data set. It is the difference between the max and min.