## **Financial Dashboard Overview**



## **Financial Dashboard Overview**

This guide provides instructions to navigate to financial dashboard and view the screen elements on the dashboard.

Note: Follow each step as instructed; otherwise, the guide might stop. To start a guide over, return to the Home page.



## Select Dashboards.

| Ste | թ 3 |                        |                 |                        |             |      |         |                         |           |             |                                |            |
|-----|-----|------------------------|-----------------|------------------------|-------------|------|---------|-------------------------|-----------|-------------|--------------------------------|------------|
|     | Ų   | CR                     | Planning an     | d Budgeting Cloud: UCI | LPLAN       |      |         |                         |           | ф 88 р      | agsahoo@deloitte.com           | n <b>▼</b> |
|     |     |                        |                 | ~ <u>+</u>             |             |      | ß       | +                       | съ<br>Съ  | ₽H          |                                |            |
|     |     |                        | Tasks           | Dashboards             | Infolets    | Data | Reports | Rules                   | Approvals | Academy     |                                |            |
|     | Re  | Expand th<br>required. | e Library folde | er, if Library         | ▼ All Types |      |         |                         |           | import      | <u>R</u> efresh <u>C</u> reate |            |
| Ξ   | Na  | ame                    | $\sim$          | De                     | scription   |      | Created | Last Modifi             | ed Re     | port Format | Actions                        |            |
|     | •   | Libra                  | iry             |                        |             |      | 2/21/23 | Not Availabl<br>2/21/23 | e         |             | •••                            |            |
|     |     |                        |                 |                        |             |      |         |                         |           |             |                                |            |
|     |     |                        |                 |                        |             |      |         |                         |           |             |                                |            |
|     |     |                        |                 |                        |             |      |         |                         |           |             |                                | •          |

Expand the Library folder, if required.

| Step 4  |                |            |             |  |         |       |           |                               |                          |
|---|----------------|------------|-------------|--|---------|-------|-----------|-------------------------------|--------------------------|
| E UCR Planning and Budgetin                       | ng Cloud: UCR_ | PLAN       |             |  |         |       |           | ☆ † 88                        | pragsahoo@deloitte.com 🔻 |
|   |                | <u>ج</u>   |             |  | B       |       | ç<br>Câ   |                               |                          |
|   | Tasks          | Dashboards | Infolets    | Data                                   | Reports | Rules | Approvals | Academy                       |                          |
| Dashboards  |                |            |             | ······································ |         |       |           | Ĩ                             | Refresh Create           |
| Search  |                |            |             |  |         |       |           |                               |                          |
| Expand the 1.0 UCR Financia<br>Dashboards folder. | I X            |            | Description |  |         |       | Created   | Last Modified                 | Actions                  |
| 4 Libr  |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| 1.0 UCR Financial Dashboards                      |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| Financials  |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| UCR_Budget Request                                |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| UCR_Budget Request - BE                           |                |            |             |  |         |       | 5/12/23   | ajpal@deloitte.com<br>5/12/23 |                          |
| UCR_Financials                                    |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| UCR_Workforce                                     |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| Workforce   |                |            |             |  |         |       | 2/21/23   | Not Available<br>2/21/23      | ***                      |
| > ZArchive  |                |            |             |  |         |       | 2/21/23   | aditij<br>6/20/23             | •                        |

Expand the 1.0 UCR Financial Dashboards folder.

| Step 5                       |                   |                     |             |      |         |       |           |                               |                          |
|------------------------------|-------------------|---------------------|-------------|------|---------|-------|-----------|-------------------------------|--------------------------|
| Planning and Budge           | ting Cloud: UCR_P | LAN                 |             |      |         |       |           | û † %                         | pragsahoo@deloitte.com 🔻 |
|                              |                   | ~ <u>+</u>          |             |      | ि       |       | <u> </u>  |                               |                          |
|                              | Tasks             | Dashboards          | Infolets    | Data | Reports | Rules | Approvals | Academy                       |                          |
| Jashboards                   |                   |                     |             | ×    | _       |       |           |                               | Refresh Create           |
| Search                       | brary             |                     | Description |      |         |       | Created   | Last Modified                 | Actions                  |
| Library                      |                   |                     | Description |      |         |       | 2/21/23   | Not Available<br>2/21/23      | ***                      |
| 1.0 UCR Financial Dashboards |                   |                     |             |      |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| Financial Dashboard (2.0)    | Click Financia    | al Dashboard (2.0). |             |      |         |       | 2/21/23   | pragsahoo@deloitt.<br>5/23/23 |                          |
| Financials                   |                   |                     |             |      |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| UCR_Budget Request           |                   |                     |             |      |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| UCR_Budget Request - BE      |                   |                     |             |      |         |       | 5/12/23   | ajpal@deloitte.com<br>5/12/23 |                          |
| UCR_Financials               |                   |                     |             |      |         |       | 2/21/23   | Not Available<br>2/21/23      |                          |
| UCR_Workforce                |                   |                     |             |      |         |       | 2/21/23   | Not Available<br>2/21/23      | ***                      |
| Workforce                    |                   |                     |             |      |         |       | 2/21/23   | Not Available                 |                          |

## Click Financial Dashboard (2.0).

| Planning and Budg                                       | eting Cloud: UCR_PLAN                   |  |  |         |                               |              |                                       |                                 | Å              |        | pragsahoo@ | deloitte.con |
|---|---|--|--|---------|-------------------------------|--------------|---------------------------------------|---------------------------------|----------------|--------|------------|--------------|
|   |   | ~ <u>`</u>   |  |         |                               |              | р<br>б                                |                                 |                |        |            |              |
|   | Tasks                                   | Dashboards   | Infolets   | Data    | Reports                       | Rules        | Approvals                             | Academy                         |                |        |            |              |
| ncial Dashboard (2.0)                                   |   |  | ×  | _       |                               |              |                                       |                                 |                |        |            |              |
| 05-CHASS Centers Programs & Other                       | You can use the Activity activity.      | y field to change the  |  |         |                               |              |                                       |                                 |                |        |            |              |
| Vorking Budget - Total Expenses                         |   | Nex  |  | Ши : то | tal Expenses - Budget vs      | Actual       |                                       |                                 |                |        |            | Lila.        |
|   | -                                       |  | 680 K  | 2.      | 4M<br>2M                      | _            |                                       |                                 |                |        |            |              |
| бол к<br>К  |   |  |  |         | 01-Jul 02-Aug                 | 03-Sep 04-Oc | t 05-Nov 06-                          | Dec 07-Jan<br>I Budget 📕 Actual | 08-Feb 09-Mar  | 10-Apr | 11-May     | 12-Jun       |
|   | 73 K                                    |  |  | Tot     | tal Revenue - Budget vs       | Actual       |                                       |                                 |                |        |            |              |
| Working Budget<br>(Rollover, Temp Budget & Adjustments) | Perm Budget<br>(Perm Budget, Adjustment | s & Recons)  | Total Plan<br>Control Budget   |         |                               |              | No da                                 | a to display                    |                |        |            |              |
| ent Month R Total E                                     | (penses by Category - C                 | Current Month  |  |         |                               |              |                                       |                                 |                |        |            |              |
| 0-Apr YearTotal   | 62 K                                    | <ul> <li>11ACSL-SL</li> <li>12ACBN-SL</li> <li>13STSL-SL SL</li> </ul> | Academic Salary<br>Academic Benefits<br>Staff Salary                   | Act     | tual Expenses by ORGs         |              | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 |                                 | 05 Nov. 06 Dec | 07 1   | 00 Feb     | 00.00-0      |
| ent Month Ex<br>r 214 K YearTotal 4 M                   | 148 K                                   | 1451BN-SL     15FNAD-SL     16GSE-SL G     17EO/AL SL                  | Student Financial Aid<br>eneral Supplies & Exp<br>Equipment & Other In | enses D | IV105-CHASS Centers Progra    | ms & Other   | 0 K                                   | a-aep 04-Oct                    | 03-110V UB-DEC | 70 K   | 0 K        | 2,444 K      |
|   |   | = nodivesu   | comprisent or other in   |         | 01012-Cntr for Biblio Studies | Dent         | OK                                    |                                 |                | 0 K    | 0 K        | 62 K         |

You can use the **Activity** field to change the activity.

| Step 7   |                                  |  |   |                  |   |               |   |              |        |             |              |
|--|----------------------------------|--|---|------------------|---|---------------|---|--------------|--------|-------------|--------------|
| Planning and Budgeting Cloud: U  | ICR_PLAN                         |  |   |                  |   |               |   |              | 88     | pragsahoo@d | leloitte.com |
|  |                                  | ~ <u>`</u>   |   |                  |   | р<br>С Ф      |   |              |        |             |              |
|  | Tasks                            | Dashboards   | Infolets  | Data             | Reports Rules   | Approvals     | Academy                                   |              |        |             |              |
| ancial Dashboard (2.0)<br>Adhity Alitund<br>V105-CHASS Centers Programs & Other 19900-GENER  | AL FUNDS                         | You can use the All required funds.  | Fund field to select  | X                |   |               |   |              |        |             | G            |
| Working Budget - Total Expenses  |                                  |  |   | Next »           | Total Expenses - Budget vs Actual                               |               |   | _            |        |             |              |
| 00K 607 K<br>00K<br>0 Working Budget   | 73 K<br>Perm Budget              | .  | 680 K<br>Total Plan   |                  | 12M<br>01-Jul 02-Aug 03-Sep<br>Total Revenue - Budget vs Actual | 04-Oct 05-Nov | 06-Dec 07-Jan 08<br>Total Budget 📕 Actual | -Feb 09-Mar  | 10-Apr | 11-May      | 12-Jun       |
| (Rollover, Temp Budget & Adjustments) (Perm Budget and Adjustments) (Perm Budget Budge | get, Adjustment:<br>Category - C | s & Recons)  | Control Budget  |                  |   |               | No data to display                        |              |        |             |              |
| 10-Apr YearTotal   |                                  | <ul> <li>11ACSL-SL</li> <li>12ACBN-SL</li> <li>13STSL-SL</li> <li>14STBN-SL</li> </ul> | Academic Salary<br>. Academic Benefits<br>Staff Salary<br>Staff Benefits    |                  | Actual Expenses by ORGs   | 01-Jul 02-Aug | 03-Sep 04-Oct 0                           | 5-Nov 06-Dec | 07-Jan | 08-Feb (    | 09-Mar       |
| urrent Month Ex<br>D-Apr 214 K YearTotal 4 M   | 18 K                             | <ul> <li>15FNAD-SL</li> <li>16GSE-SL G</li> <li>17EDIN-SL</li> </ul>                   | . Student Financial Aid<br>Seneral Supplies & Expe<br>Equipment & Other Inv | nses<br>entorial | DIV105-CHASS Centers Programs & Other                           | 0 К           |   |              | 70 K   | oκ          | 2,444 K      |
|  |                                  | 09 Eeb   | sequences of Webber 119   | active ratio     | D01012-Cntr for Biblio Studies Dept                             | 0 K           |   |              | 0 K    | 0 K         | 62 K         |

You can use the **All Fund** field to select the required funds.

| Planning and Budgeting Cloud: UCR_PLAN   |  |   |             |                                |                       |                |                                 |               |          | pragsahoo@ | deloitte.con |
|--|--|---|-------------|--------------------------------|-----------------------|----------------|---------------------------------|---------------|----------|------------|--------------|
|  | ¥  |   |             |                                |                       | <u> </u>       |                                 |               |          |            |              |
| Tasks  | Dashboards   | Infolets  | Data        | Reports                        | Rules                 | Approvals      | Academy                         |               |          |            |              |
| ncial Dashboard (2.0)  | Years  | You can use the <b>Years</b> drop<br>required financial year.   | odown to se | × elect the                    |                       |                |                                 |               |          |            |              |
| Working Budget - Total Expenses  |  |   |             | Next :- Budget vs              | Actual                |                |                                 |               |          |            |              |
| К 607 К<br>К 73 I  | daet   | 680 K   | Тс          | 0<br>01-Jul 02-Aug             | 03-Sep 04-O<br>Actual | Act 05-Nov 06- | Dec 07-Jan<br>al Budget 📕 Actua | 08-Feb 09-Mar | 10-Apr   | 11-May     | 12-Jun       |
| (Rollover, Temp Budget & Adjustments) (Perm Budget, Adjus<br>ent Month R Total Expenses by Categor | ments & Recons)  | Control Budget  |             |                                |                       | No da          | ta to display                   |               |          |            |              |
| 0.Apr YesrTotal  | <ul> <li>11ACSI</li> <li>12ACBI</li> <li>13STSL</li> <li>14STBI</li> </ul> | -SL Academic Salary<br>V-SL Academic Benefits<br>-SL Staff Salary<br>I-SL Staff Benefits<br>-SL Stadeat Sizersial Aid | A           | ctual Expenses by ORGs         | 0                     | 1-Jul 02-Aug ( | )3-Sep 04-Oct                   | 05-Nov 06-Dec | : 07-Jan | 08-Feb     | 09-Mar       |
| pr 214 K YearTotal 4 M   | 1665E-   | SL General Supplies & Expenses  | ial         | DIV105-CHASS Centers Progra    | ms & Other            | 0 К            |                                 |               | 70 K     | 0 K        | 2,444 K      |
|  | - 176321   | eac agaipment of other invention  |             | D01012-Cotr for Biblio Studies | Dent                  | OK             |                                 |               | 0 K      | 0K         | 62 K         |

You can use the Years dropdown to select the required financial year.

| Planning and Budgeting Cloud:                  | UCR PLAN       |                      |   |           |  |  |               |                      | $\land$       | 5 88     | pragsahoo | @deloitte.com |
|--|----------------|----------------------|---|-----------|--|--|---------------|----------------------|---------------|----------|-----------|---------------|
|  |                |                      |   |           |  |  |               |                      |               |          |           |               |
|  |                | 딸                    |   |           |  |  | 66            |                      |               |          |           |               |
|  | Tasks          | Dashboards           | Infolets  | Data      | Reports  | Rules  | Approvals     | Academy              |               |          |           |               |
| ancial Dashboard (2.0)                         |                |                      |   |           | _  |  |               |                      |               |          |           | G             |
| ctivity AliPund                                |                | Years                |   |           |  |  | ×             |                      |               |          |           |               |
| 105-CHASS Centers Programs & Other 19900-GENE  | RAL FUNDS      | FY22-23 🔻            |   |           | You can use the Chart Typ<br>chart displayed on the dash | e <sup>14</sup> icon on any<br>board by hovering | -             |                      |               |          |           |               |
| Vorking Budget - Total Expenses                | _              |                      |   | ш <       | over the top-right side of th                            | e chart.   | _             |                      |               |          |           |               |
|  |                |                      | 590 V   |           |  | Back Next  |               |                      |               |          |           |               |
| 607 K<br>DK                                    |                |                      |   |           | 01-Jul 02-A  | ug 03-Sep 04-                                    | Oct 05-Nov I  | 06-Dec 07-Jan        | 08-Feb 09-Mar | 10-Apr   | 11-May    | 12-Jun        |
| ок   | 73 14          |                      |   |           |  |  |               | otal Budget 📕 Actual |               |          |           |               |
| 0 Working Rudget                               | 73 K           |                      | Total Dian  |           | Total Revenue - Budg                                     | et vs Actual                                     |               |                      |               |          |           |               |
| (Rollover, Temp Budget & Adjustments) (Perm Bu | dget, Adjustme | nts & Recons)        | - Control Budget                                      |           |  |  | No            | data to display      |               |          |           |               |
| rent Month R Total Expenses by                 | Category       | Current Month        |   |           |  |  |               |                      |               |          |           |               |
| 10-Apr YearTotal                               |                | 11ACSL-S<br>12ACBN-  | SL Academic Salary<br>SL Academic Benefits            |           | Actual Expenses by O                                     | PGe  |               |                      |               |          |           |               |
| 62 K   |                | 13STSL-SI            | L Staff Salary<br>SL Staff Benefits                   |           | Actual Expenses by 0                                     | 1103   | 01-Jul 02-Aug | 03-Sep 04-Oct        | 05-Nov 06-Der | c 07-Jan | 08-Feb    | 09-Mar        |
| rrent Month Ex<br>Apr 214 K YearTotal 4 M      | 148 K          | 15FNAD-:<br>16GSE-SL | SL Student Financial Aid<br>. General Supplies & Expe | enses     | DIV105-CHASS Centers F                                   | rograms & Other                                  | oк            |                      |               | 70 K     | οĸ        | 2.444 K       |
|  |                | 17EQIN-S             | SL Equipment & Other Inv                              | ventorial |  |  | or            |                      |               |          |           | C2 K          |

You can use the **Chart Type** icon on any chart displayed on the dashboard by hovering over the top-right side of the chart.

| Planning and Budgeti                                      | ng Cloud: UCR_PLAN                   |   |  |           |  |                                 |                            |  |               |          | pragsahoo@d | eloitte.com |
|---|--------------------------------------|---|--|-----------|--|---------------------------------|----------------------------|--|---------------|----------|-------------|-------------|
|   |                                      | ~   |  |           |  |                                 | ç<br>G                     |  |               |          |             |             |
|   | Tasks                                | Dashboards  | Infolets   | Data      | Reports                                    | Rules                           | Approvals                  | Academy  |               |          |             |             |
| ancial Dashboard (2.0)                                    |                                      |   |  | _         |  |                                 |                            |  |               |          |             | 6           |
| ctivity All<br>105-CHASS Centers Programs & Other 19      | Fund<br>900-GENERAL FUNDS            | Years<br>FY22-23 🐨  |  | 1         | You can use the Ellipsis                   | on any chart<br>by hovering ove | × rthe                     |  |               |          |             |             |
| Working Budget - Total Expenses                           | -                                    |   | i.   | LLL : < ; | op-right side of the chart to<br>he chart. | Refresh or Max                  | imize                      |  |               |          |             |             |
| ж 607 к<br>Эк   | 73 K                                 | _   | 680 K  | Tot       | 01-Jul 02-Aug<br>tal Revenue - Budget vs J | US-Sep 04-0<br>Actual           | ext<br>ct US-Nov Of<br>Tot | i-Dec 07-Jan<br>tal Budget <mark>–</mark> Actual | 08-Feb 09-Mar | 10-Apr   | 11-May      | 12-Jun      |
| 0 Working Budget<br>(Rollover, Temp Budget & Adjustments) | Perm Budge<br>(Perm Budget, Adjustme | t<br>nts & Recons)  | Total Plan<br>Control Budget   |           |  |                                 | No d                       | ata to display                                   |               |          |             |             |
| rent Month R Total Exp<br>10-Apr YearTotal                | enses by Category -                  | Current Month<br>11ACSL-SI<br>12ACBN-S<br>13STSL-SL<br>14STBN-S   | , Academic Salary<br>L Academic Benefits<br>Staff Salary<br>L Staff Benefits     | Act       | tual Expenses by ORGs                      | 0                               | 1-Jul 02-Aug               | 03-Sep 04-Oct                                    | 05-Nov 06-Dec | : 07-Jan | 08-Feb (    | 09-Mar      |
| rrent Month Ex<br>Apr 214 K YearTotal 4 M                 | 148 K                                | <ul> <li>15FNAD-S</li> <li>16GSE-SL</li> <li>17FOIN-SI</li> </ul> | L Student Financial Aid<br>General Supplies & Expen<br>Fourioment & Other Invest | ses D     | IV105-CHASS Centers Program                | ns & Other                      | ОК                         |  |               | 70 K     | οĸ          | 2,444 K     |
|   |                                      |   |  | D         | 01012-Cntr for Biblio Studies              | Dept                            | 0 K                        |  |               | 0 K      | 0 K         | 62 K        |

You can use the **Ellipsis** i on any chart displayed on the dashboard by hovering over the top-right side of the chart to **Refresh** or **Maximize** the chart.

| Planning and Budgeting Close   | ad: UCR_PLAN        |   |   |               |                           |                   |                    |                                  | <u> </u>  | 00 pragsa   | hoo@deloitte.com                        |
|--|---------------------|---|---|---------------|---------------------------|-------------------|--------------------|----------------------------------|---|---|---|
|  |                     | ₩   |   |               |                           |                   | р<br>ба            |                                  |   |   |   |
|  | Tasks               | Dashboards  | Infolets  | Data          | Reports                   | Rules             | Approvals          | Academy                          |   |   |   |
| inancial Dashboard (2.0)   |                     |   |   |               | _                         |                   |                    |                                  |   |   | G                                       |
| All Activity AllFund<br>DIV105-CHASS Centers Programs & Other 19900-GE | NERAL FUNDS         | Years<br>FY22-23 💌  |   |               |                           |                   |                    |                                  |   |   | ×                                       |
| L Working Budget - Total Expenses                                      |                     |   |   | Total<br>2.4M | Expenses - Budget vs      | Actual            |                    |                                  | the page to Edit D<br>Bar: Hide Dimens<br>Apply data displa | ashboard, Refr<br>sion Labels, PO<br>yed on the dashi | esh Data, POV<br>V Bar: Auto-<br>toard. |
| 00K 607 K  |                     |   | 680 K   | 1.2M<br>0     | 01-Jul 02-Aug             | 03-Sep 04-Oct     | : 05-Nov 06        | Dec 07-Jan<br>al Budget 📕 Actual |   |   | Next »                                  |
| 00K  | 73 K<br>Perm Budget |   | Total Plan  | Total         | Revenue - Budget vs       | Actual            |                    |                                  |   |   |   |
| (Rollover, Temp Budget & Adjustments) - (Perm                          | Budget, Adjustmen   | ts & Recons)  | Control Budget  |               |                           |                   | No da              | ta to display                    |   |   |   |
|  | by Category -       | Current Month   | L Academic Salary   |               |                           |                   |                    |                                  |   |   |   |
| urrent Month R Total Expenses<br>10-Apr YearTotal                      | K                   | 12ACBN-S  | L Academic Benefits   | Actua         | al Expenses by ORGs       |                   |                    |                                  |   |   |   |
| Current Month R Total Expenses   | 2 K<br>148 K        | <ul> <li>11ACSL-SL</li> <li>12ACBN-S</li> <li>13STSL-SL</li> <li>14STBN-SI</li> <li>15FNAD-S</li> <li>16GSE-SL</li> </ul> | IL Academic Benefits<br>. Staff Salary<br>L Staff Benefits<br>IL Student Financial Aid<br>General Supplies & Expenses | Actua         | 105-CHASS Centers Program | 01.<br>ms & Other | <b>-Jul 02-Aug</b> | 03-Sep 04-Oct                    | 05-Nov 06-Dec   | 07-Jan 08-F   | eb 09-Mar                               |

You can use the **Settings** icon on the top-right of the page to **Edit Dashboard**, **Refresh Data**, **POV Bar: Hide Dimension Labels**, **POV Bar: Auto-Apply** data displayed on the dashboard.

