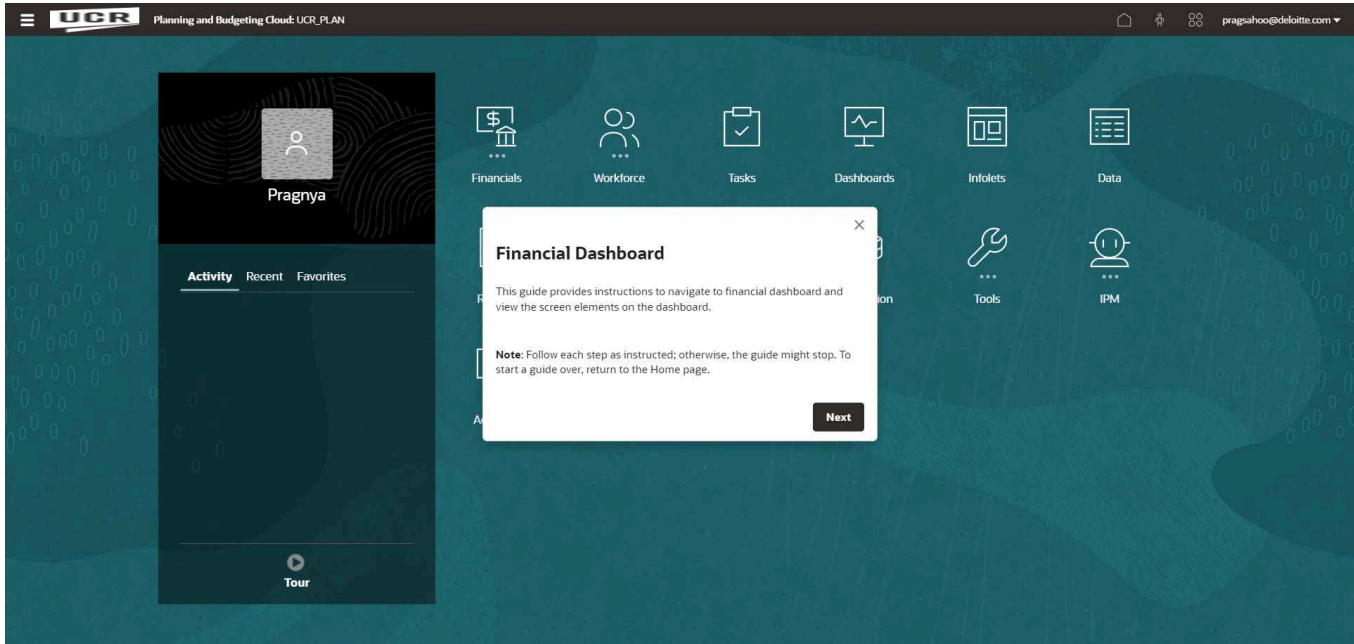


Financial Dashboard Overview

Step 1

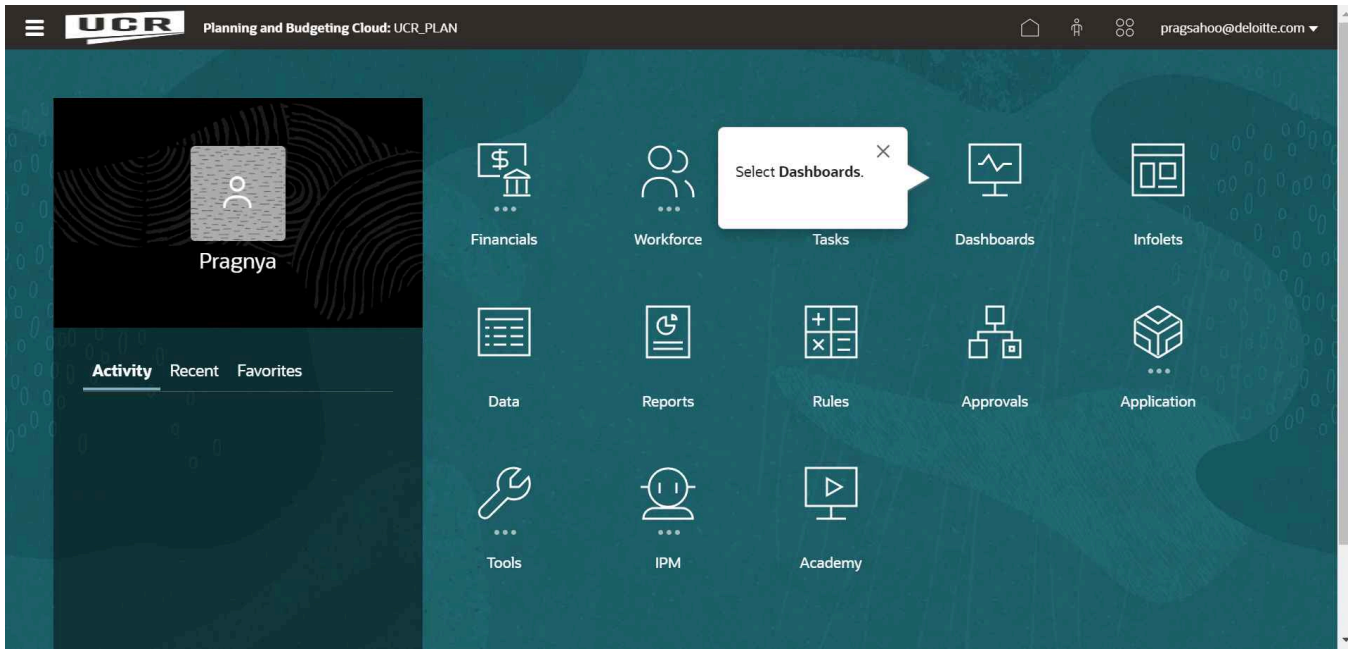


Financial Dashboard Overview

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

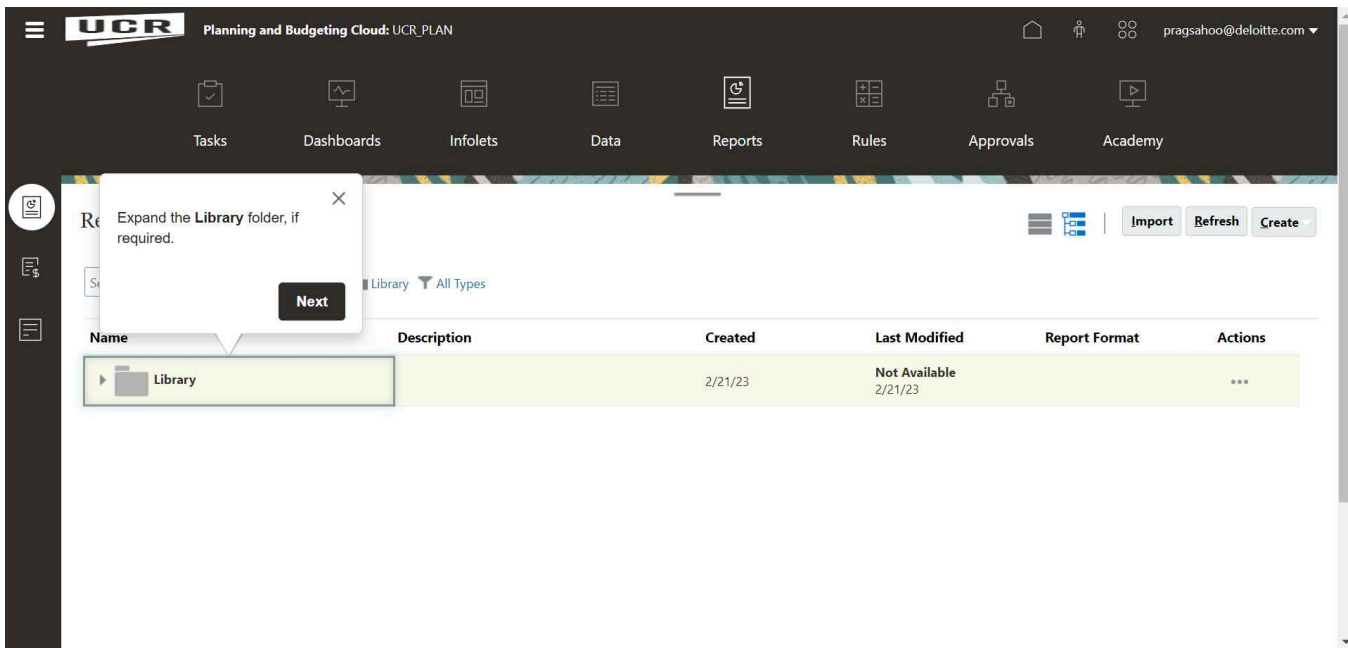
Note: Follow each step as instructed; otherwise, the guide might stop. To start a guide over, return to the Home page.

Step 2



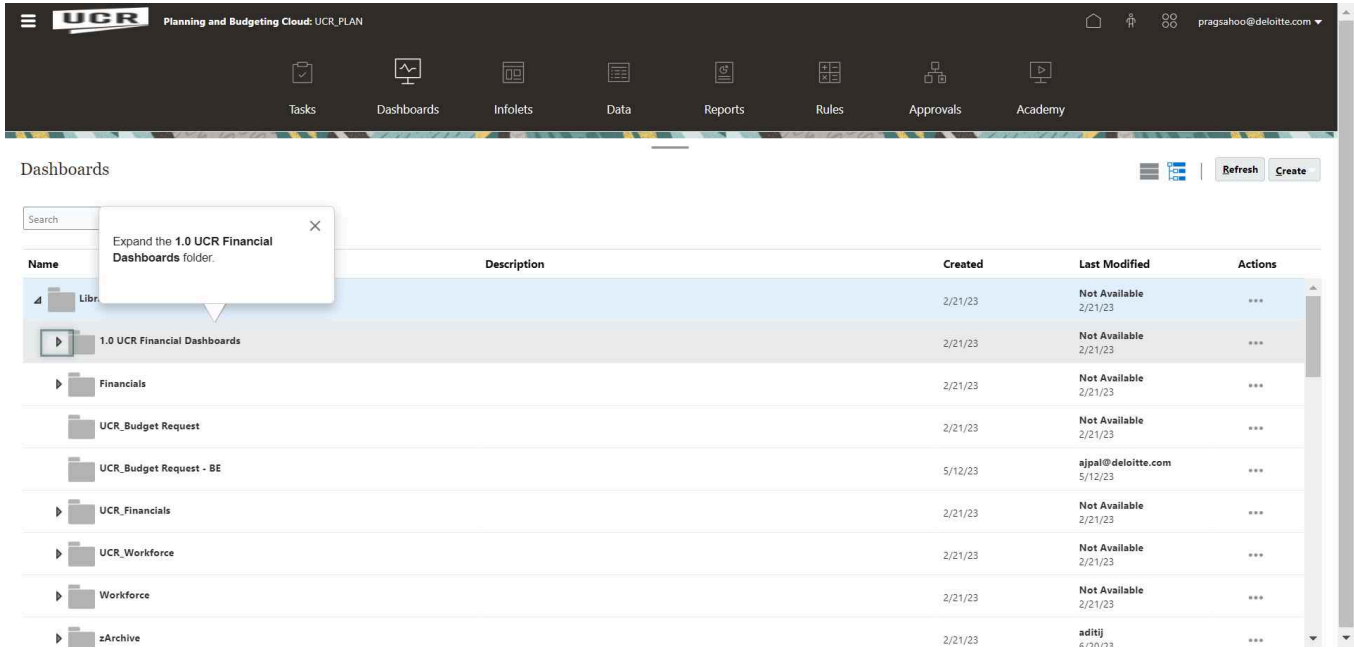
Select **Dashboards**.

Step 3



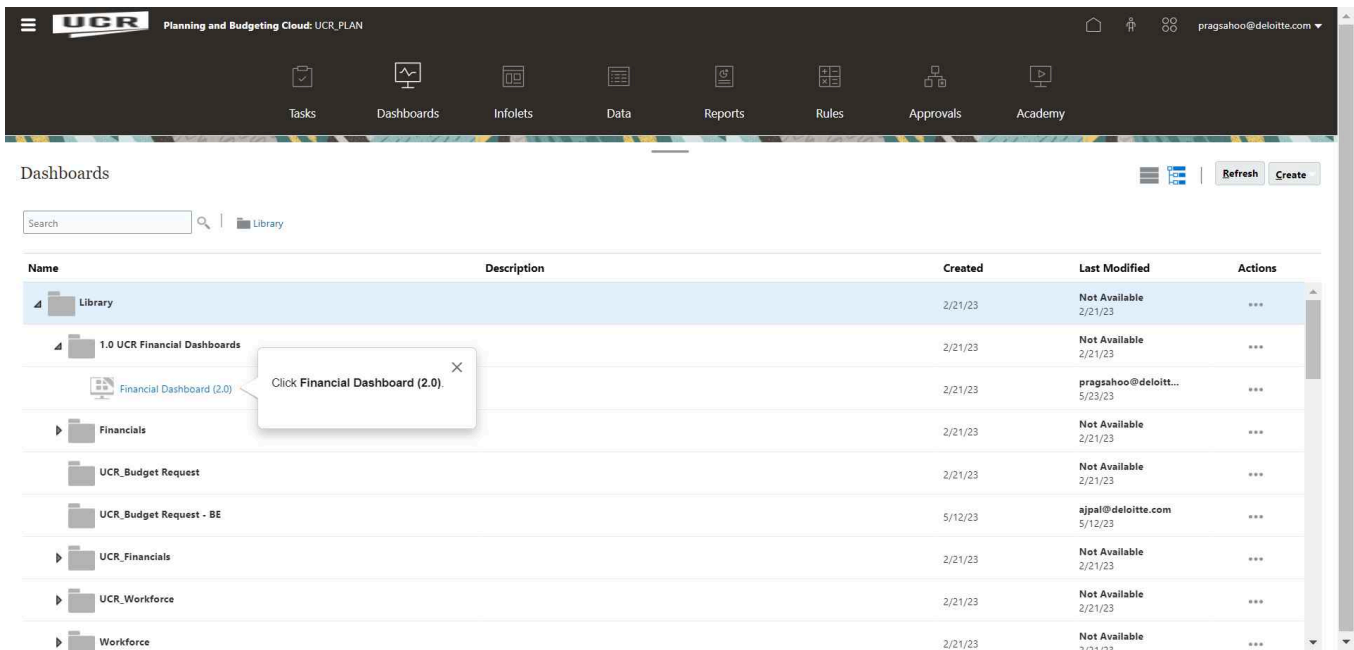
Expand the **Library** folder, if required.

Step 4



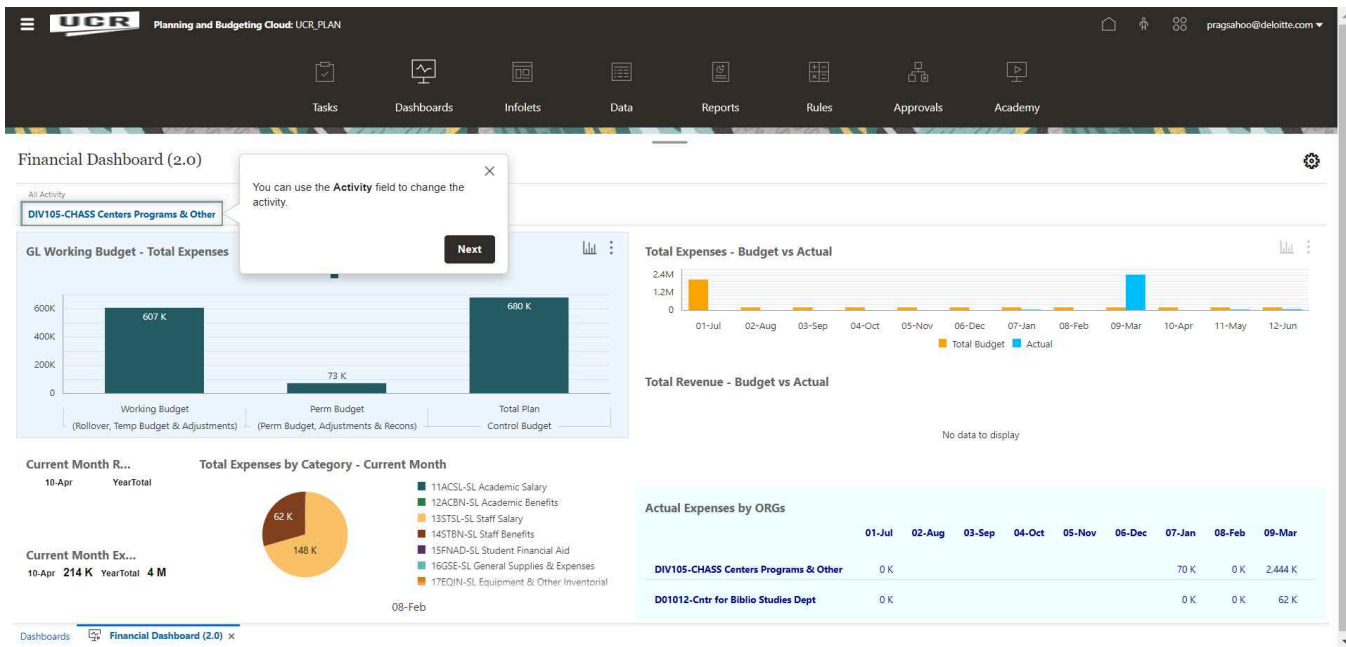
Expand the **1.0 UCR Financial Dashboards** folder.

Step 5



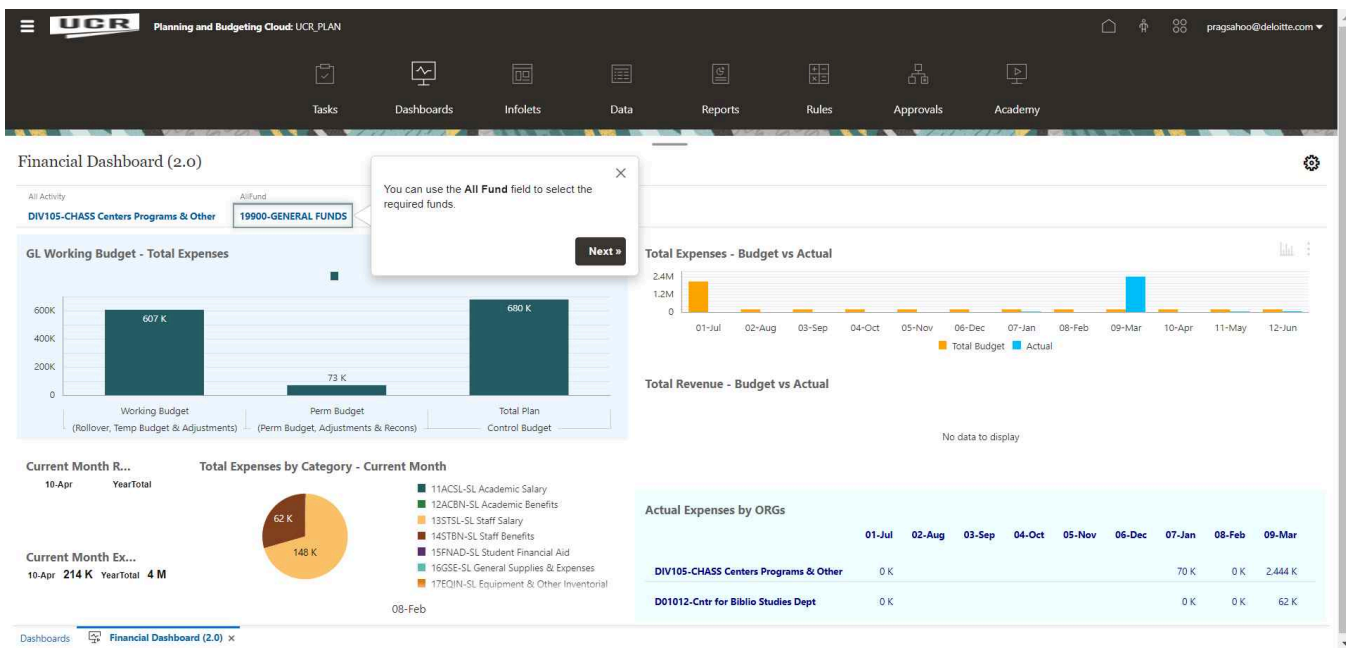
Click **Financial Dashboard (2.0)**.

Step 6



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

Step 7



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

Step 8

The screenshot shows the 'Financial Dashboard (2.0)' interface. At the top, there is a navigation bar with icons for Tasks, Dashboards, Infolets, Data, Reports, Rules, Approvals, and Academy. Below this, the dashboard displays various financial metrics. A callout box points to the 'Years' dropdown menu, stating: 'You can use the Years dropdown to select the required financial year.' The dashboard includes a bar chart for 'GL Working Budget - Total Expenses' with values of 607 K, 73 K, and 680 K. It also features a 'Total Revenue - Budget vs Actual' chart and a table for 'Actual Expenses by ORGs'.

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

Step 9

The screenshot shows the 'Financial Dashboard (2.0)' interface. A callout box points to the 'Chart Type' icon on the right side of the 'GL Working Budget - Total Expenses' chart, stating: 'You can use the Chart Type icon on any chart displayed on the dashboard by hovering over the top-right side of the chart.' The dashboard displays various financial metrics, including a bar chart for 'GL Working Budget - Total Expenses', a 'Total Revenue - Budget vs Actual' chart, and a table for 'Actual Expenses by ORGs'.

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

Step 10

The screenshot shows the 'Financial Dashboard (2.0)' interface. At the top, there's a navigation bar with icons for Tasks, Dashboards, Infolets, Data, Reports, Rules, Approvals, and Academy. Below this, the dashboard displays several data visualizations:

- GL Working Budget - Total Expenses:** A bar chart showing Working Budget (607 K), Perm Budget (73 K), and Total Plan (680 K).
- Total Revenue - Budget vs Actual:** A line chart showing budget vs actual revenue over time, with a 'No data to display' message.
- Total Expenses by Category - Current Month:** A pie chart showing expenses for 10-Apr, with a 'YearTotal' of 4 M.
- Actual Expenses by ORGs:** A table showing expenses for two ORGs across various months.

A tooltip is overlaid on the chart area, stating: "You can use the **Ellipsis** on any chart displayed on the dashboard by hovering over the top-right side of the chart to **Refresh** or **Maximize** the chart." A 'Next' button is visible at the bottom of the tooltip.

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

Step 11

The screenshot shows the 'Financial Dashboard (2.0)' interface, similar to Step 10. A tooltip is overlaid on the right side of the dashboard, stating: "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." A 'Next' button is visible at the bottom of the tooltip.

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.

Step 12

The screenshot shows the 'Financial Dashboard (2.0)' interface. At the top, there is a navigation bar with icons for Tasks, Dashboards, Infolets, Data, Reports, Rules, Approvals, and Academy. Below this, the dashboard title 'Financial Dashboard (2.0)' is displayed. The main content area includes several charts and tables:

- GL Working Budget - Total Expenses:** A bar chart showing Working Budget (607 K), Perm Budget (73 K), and Total Plan (680 K).
- Total Expenses - Budget vs Actual:** A line chart comparing Total Budget and Actual expenses over time, with a 'No data to display' message.
- Total Revenue - Budget vs Actual:** A line chart with a 'No data to display' message.
- Current Month R...:** A pie chart showing Total Expenses by Category for the current month (10-Apr), with values of 62 K and 148 K.
- Current Month Ex...:** A table showing Current Month Expense (10-Apr: 214 K) and Year Total (4 M).
- Actual Expenses by ORGs:** A table showing actual expenses for two ORGs from July to March.

A pop-up window with the text 'This completes the guide.' and a 'Done' button is overlaid on the dashboard.

This completes the guide.