Chapter 3: Using Dashboard Help

Effectively using Page Selectors is necessary to ensure that the data displayed is the data needed.

Help on using Page Selectors is available by clicking the ? icon.
Select the question mark button.
A new tab/window will appear with the help section you selected.

You can scroll through to read the information.
Click the X to close the help section.
Help specific to each section is also available by clicking the ? icon in that section.
Help - Budget vs Actual

Added by Bama J. King, last edited by John Jaconelli on Nov 07, 2012 (view change)

Purpose:
This report compares budgets to actual income and expenses on a monthly, to-date, or to-date-with-encumbrance basis, calculating dollar and percent variances to the amounts budgeted.

General Notes
• Financial activity is limited to income and expense; balance, asset, and liability activity are ignored in this report.
• A grand total for each column of financial data appears at the bottom of the table.
• Variance calculations by month will be more meaningful if monthly budgets have been created in KFS.

Budget vs Actual
• Value Selection Fields – these fields provide the user with the ability to set five different variance ranges, which will flag variances that fall within or exceed certain levels. The ranges are color-coded and show in the bar in the Budget vs Actual section:
  • Lower Limit – mauve
  • Lower Limit to Lower Mid – peach
  • Lower Mid to Upper Mid – white
  • Upper Mid to Hi Limit – peach
  • Hi Limit – mauve
  • To change the default values enter one or more new values in the edit boxes and click Go.

• Select a View – choose one of the following three options from the drop-down menu:
  • To Date – this is the default selection. To date for the fiscal year and period identified in the same selections section.
Budget vs Actual

- Value Selection Fields – these fields provide the user with the ability to set five different variance ranges, which will flag variances that fall within or exceed certain levels. The ranges are color-coded and show in the bar in the Budget vs Actual section:
  - Lower Limit – mauve
  - Lower Limit to Lower Mid – peach
  - Lower Mid to Upper Mid – white
  - Upper Mid to High Limit – peach
  - High Limit – mauve
- Select a View – choose one of the following three options from the drop-down menu:
  - To Date – this is the default selection, to date for the fiscal year and period identified in the page selections section.
  - To Date of Encumbrance – to date for the fiscal year and period identified in the page selections section plus encumbrances added to expense amounts.
  - Selected Month – activity limited to the particular fiscal period identified in the page selections.

- Budget vs Actual Report – for the organization(s) or account(s) chosen in the page selections section, and for the values and view chosen, the following values will be displayed: college/division, to-date income budget, to-date income, to-date income variance $, to-date income variance %, to-date expense budget, to-date expense or to-date expense encumbrance (if to date with encumbrance selected), to-date expense variance $, to-date expense variance %, and options (linked view).
- The first column may be drillable depending on the dashboard page selected:
  - College/division on the Organization Summary page is drillable to Level-16.
  - Parent Organization on the Organization Listing page is drillable to Child Org Type/With Name.
- Selecting the chevron button in the column labeled Options provides additional details, which vary by dashboard page, for each row in the table. These optional views include:
  - Analyze by Account – income and expense (budgets and actuals) by account. (This option is available on the Organization Summary, Organization Listing, and Specific Organization with Account dashboard pages.) The options column in each row of the linked view will also display the following secondary linked views:
Click the X to close the help window.
Back on the dashboard page.