Chapter 3: Using Dashboard Help

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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.

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Select the **question mark** button.

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Added by Corey L Merrell, last edited by Jutta lacovelli on Nov 05, 201	12 (<u>view change</u>)			
Help - Page Selections				_1
Basic/Advanced Page Selectors	N		You can scroll through	n to
Purpose	E Colorador		read the information.	
Page selections allow the user to employ specific parameters to organization or set of accounts and a specific time period, other				
Selections – Basic and Advanced				
 When the design of a dashboard page requires many sele minimum and most often used set and the advanced grou selections. If advanced selectors exist on a dashboard page, radio bu To view additional page selection choices, click on the Ad 	ping containing the complete arra	ay. The default view for each dashboard pa d will appear in the upper left corner.	age is the basic set of	
Selector Types				
There are three types of selectors:				
 Single-Select* – displays all of the choices available for a the selection. 	particular parameter, but only on	e choice can be made at a time. Choosin	g the desired value implemer	nts
 Multi-Select* – displays all of the choices available for a p on the dropdown arrow and click Search. This will open a right side contains the choices made. Choices can be mo Click OK once the selection(s) are made. 	dialog box with a set of controls	. The left side of the dialog box presents t	he list of possible choices; th	he
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A new tab/window will appear with the help section you selected.

You can scroll through to read the information.

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 Click on the Page Options icon in the upper right hand corner of the dashboard to reveal a drop-down list of choices. Select Save Current Customizations. Name the saved customization. Choose For Me. Check the Default for the Page box to make the saved selection the default for the page. If this is done, each time the page opens thes saved page selections will be loaded automatically. Click OK. 	e
Using Multiple Saved Customizations	
 Each user can have multiple saved page customizations; only one customization can be identified as the default for the page. To view the list of saved customizations: Click on the Page Options icon in the upper right hand corner of the dashboard. Choose Apply Saved Customization; a list of all saved selections will appear. Highlight and click the selection desired. Page selections will be changed and applied; each request will refresh and display data for the saved customization. Editing the Saved Customizations List 	
 The list of saved selections can be edited as follows: Click on the Page Options icon in the upper right hand corner of the dashboard. Choose Edit Saved Customizations. Use the radio button to edit the default selection for the page. Use the text box to rename a saved selection. Use the red X to delete a selection from the list. 	
Click OK Labels: None	=
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Click the X to close the help section.

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Help specific to each section is also available by clicking the ? icon in that section.

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Added by Rayna J King, last edited by Jutta lacovelli on Nov 07, 2012 (view change)	🌼 Tools 🔻	F
Purpose		
This report compares budgets to actual income and expenses on a monthly, to-date, or to-date-with-encumbrance basis, calculating dollar and pr amounts budgeted.	ercent variances to the	
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 fail levels. The ranges are color-coded and show in the bar in the Budget vs Actual section: < Lower Limit – mauve default value is -15 Lower Limit to Lower Mid – peach default value is -5 Lower Mid to Upper Mid – white default value is 5 Upper Mid to High Limit – peach default value is 15 Upper Mid to High Limit – peach default value is 15 Select a View, abseques of the following these extince from the dera down means: 	ll within or exceed certair	n
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 Upper Mid to High Limit – peach default value is 15 > High Limit – mauve To change the default values enter a 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: <u>To Date</u> – this is the default selection, to date for the fiscal year and period identified in the page selections section. <u>To Date w/ Encumbrance</u> – to date for the fiscal year and period identified in the page selections section plus encumbrances added to expense amount <u>Selected Month</u> – activity limited to the particular fiscal period identified in the page selections. 	S.
 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 value 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 \$, to-date expense variance \$, and options (linked view). 	ate
 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 Constraints a the Organization for the presence of the Devel-16 on Time With Name 	
 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: 	
 <u>Analyze by Account</u> – income and expense (budgets and actuals) by account. (This option is available on the Organization Summary, Organization List and Specific Organization with Account dashboard pages.) The options column in each row of the linked view will also display the following secondary liviews: 	
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the help window.	
Columns are sortable if the cursor changes to a selection tool (e.g., a hand) is rolled over with the mouse. Two small triangles will appear after the column name. Click the upward pointing triangle to sort the column in ascending order; click the downward pointing triangle to sort the column in	ar 🔺
descending order. The color of the small triangles will indicate how the column is sorted; one triangle will be darkened to indicate the direction of the sort. Sortin	g
has not been applied if both triangles are light-colored.	
Viewing All Records	
 Tables that display individual accounts may return numerous lines of data, depending on the selection criteria. If more than 25 lines of data are returned the table truncated, with only the first 25 rows shown, and a set of navigation buttons appears at the bottom of a table. These buttons will allow the user to incrementally 	is
scroll through the record set (up or down, 25 at a time) or display all records by selecting the button with the double-arrow.	
Refresh / Print / Export / Return / Back / Create Bookmark Link	
At the bottom of the table (below the gray box) are three hyperlinks:	
• Refresh - will return the section to a default state based on the page selections made above. This feature can be useful if the browser's back button has been use	ed
to navigate back to a launch page and the selection criteria appear to be improperly applied. Print – will allow the section to be printed in either HTML or PDF format. 	
• Export - will allow the section's data to be exported to one of the following formats: PDF, Excel, PowerPoint, Web Archive (.mht) or data (CSV Format, Tab	
delimited Format, XML Format).	
These three choices may be augmented with some or all of the following hyperlinks:	
Return – will take the user back to the launch page, no matter how many intervening drill selections were made. Using this hyperlink is safer than employing the how many intervening drill selections were made.	
browser's back button to return to the launch page. Back – will take the user one step back in a drill selection sequence. The Back hyperlink will continue to appear until the user is returned to the launch page. 	
Create Bookmark Link – creates a bookmark link in the browser's address bar that is suitable for saving or sharing.	
Labels: None	
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Click the \boldsymbol{X} to close the help window.

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Back on the dashboard page.