D.01 Financial Operations Dashboard

Overview

The Financial Operations Dashboard is designed to provide all users with a portal to obtain quick access to track budgets and balances across all funds and to track activity through the Accounts Payable pipeline (Purchase Order-->Invoice-->Voucher-->Payment).

This dashboard is currently comprised of four dashboard pages. They are:

i. Balance Overview

ii. Balance Detail

iii. Vendor Search

iv. PO Search

Who should use this Dashboard?

This dashboard is intended for users who have the responsibility to monitor and manage budgets and financial transactions but for whom accounting and financial management may not be their primary responsibility. It combines information that is currently available across a number of standard finance reports (Budget Summary, Budget Detail, Fund Balance, Budget Exception, Budget Control, AP reports) into one central source for monitoring budget balances and related activity; users who currently utilize the standard finance reports may find this dashboard to be a valuable tool. Users can gain access to this dashboard by completing the e-Learning training module.

Use Notes

A wide variety of dashboard prompts have been provisioned to filter results on each page. The Balance Overview and Balance Detail tabs were designed to be run without the need for any additional prompt filtering. The Vendor Search and PO Search tabs require the designation of one and only one Vendor (Vendor Search) or Purchase Order ID (PO Search) in order to access results. Consult the sections for each dashboard page for further details.

Users are able to drill from dashboard results into other pages of the dashboard and across to other finance reports. Consult the sections for each dashboard page for a list of available drill reports.