Purpose – The Financial Indicators Dashboard provides deans, department chairs, division and department heads with quick access to summary metrics of financial activity, generally in graphical form. Users have options of selecting data by fund, account category, accounting period and org, but transaction level detail is not provided. All of the data in the Financial Indicators Dashboard are loaded into the UDW+ Data Warehouse from fame. Financial data are updated nightly.

2. Target Audience – The Financial Indicators Dashboard is available to all department and division heads but is tailored to the needs of the academic sector.

3. Dashboard Pages –
- Summary
- Revenue
- Expense
- Tuition
- Endowment
- Expendable Fund Balance
- Sponsored Programs
- Capital Projects

4. Training Access – Users must complete the UDW+ financial reporting iLearn training in order to gain access. Users who complete training on ad hoc reporting will be able to customize the dashboard objects to meet their specific needs and/or use them as the basis for creating new dashboards to meet the specific needs of their units.

5. Data Security – User access is determined by fame chartfield security. Because users with different security access will see different numbers on the dashboard, the user ID is displayed at the top of each page to avoid confusion.

6. User Notes – Please note the following terms and data usages:
- Direct Operating Revenue and Expense: To profile the revenue and expenses that support the general operations of a division or department, this dashboard uses the categories “direct operating revenue” and “direct operating expense.” They include all undesignated funds plus donor and management designated funds (20, 21 and 22) and exclude transfers. The excluded funds are endowment, sponsored program, capital and others whose use is restricted to very specific purposes.
- Account Hierarchies and Organization of Account Data: Unless otherwise indicated, dashboard analyses are presented using the Washington Square Financial Plan reporting hierarchy. This hierarchy groups accounts into revenue and expense categories that mirror the University financial plan. The Washington Square Financial Plan reporting hierarchy groups financial aid as an offset to tuition revenue.
- Accounting Periods and Comparisons: The Financial Indicators Dashboard places current information in context with prior year comparisons. As indicated in the graph titles, some of those comparisons are made with complete prior fiscal years but many compare current information with information from the same time in prior years. In those “same-time-last-year” comparisons, current data (as of the last nightly refresh) are compared to the value at the end of the current accounting period in prior years. For example on November 15, 2012 the dashboard compares data as of November 15, 2012 with month-end data as of November 30 in prior years. Note that as a result the end of the current-year trend line may appear flatter than prior years. Additionally, please note that on pages where an accounting period cannot be manually selected, analyses are presented using the current period. The current period is displayed at the top of each page to avoid confusion. When a period can be selected choosing a future period will yield no results for the current year.
• **Budget:** In general the original budget for a fiscal year is used in this dashboard, not the Revised Budget. Exceptions are labeled.

Note the following list of available prompts. Page-specific prompts are further described in each of the dashboard pages.

• **Organizational Unit:** By default, all the pages of the Financial Indicators Dashboard open to the aggregated view of all the chartfields to which a user has access. Units within the organizational hierarchy defined in DRM may be selected. Business unit always defaults to WSO01 but an alternative may be selected.

• **Fund:** Most pages permit the selection of a fund group, designated or undesignated, fund class, such as Budget Appropriation Funds, or a specific Fund. Funds are categorized by the fund hierarchy defined in DRM.

• **Accounting Period:** Some pages permit the selection of an accounting period, generally a month, as an alternative to the current, default accounting period. Selecting an accounting period later than current one should be done with care because the current year-to-date amount will be compared with prior year data for the period selected. For example, selecting March data in December 2012 will produce graphs comparing December 2012 data with March 2009, 2010 and 2011.

7. **Support** – If there is an issue that you would like to report or you have questions about DW+, please contact the Decision Support Group by email at askDSG@nyu.edu or call 212-998-2900 (extension 82900).

8. **Additional Resources** – Details supporting the summary metrics presented in the Financial Indicators dashboard are provided in Budget Detail and Budget Summary reports as well as the Financial Operations, Comparative Analysis, and Grants Management dashboards. Training is recommended for those who are new to UDW+. To schedule a one-on-one training session, contact the Decision Support Group at 212-998-2900 or email askdsg@nyu.edu. The NYU Business Glossary is a living document that contains commonly used NYU business terms for reference.