D.02 Comparative Analysis Dashboard

Overview

The Comparative Analysis Dashboard is intended to provide users with the ability to trend and forecast different financial measures and dimensions. This dashboard primarily uses aggregate year-to-date and monthly data from the Budget Summary Subject Area. Users can trend a number of financial measures such as Budget, Actuals and *Balance and this information can be analyzed by Time (Fiscal Years), Account, Program and Project. There are also some calculated fields throughout the dashboard pages and there are provisioned to be drills to additional reports within the dashboard pages.

This dashboard currently has six different dashboard pages:

i. Summary

ii. Time Comparison Analysis

iii. Account Comparison Analysis

iv. Program Comparison Analysis

v. Project Comparison Analysis

vi. Variance Analysis

One of the guiding principles of this dashboard is to provide users with the maximum amount of flexibility and interactivity within each page. The dashboard is designed to create meaningful metrics and reports with 'guided analytics' by accessing simple drop-down menus. For deeper analysis, each report is provisioned with an “Analyze” report link and numerous options for exporting the data. Clicking on this link will bring users directly into an ad hoc reporting view (if the user has ad hoc access in OBIEE). The pages are also designed to include a number of drop-down options to look at the data a number of different ways. Pivot tables are also included on the pages for each of the graphical reports which gives users the ability to “drag and drop” columns to rows and rows to columns.

Users will come to this dashboard for analysis at the program, project, account category and department level. More detailed analysis down to the journal line level can be done within the Financial Operations dashboard.

*Balance is defined in this dashboard as Revised Budget minus Actuals minus Encumbrances

Who should use this Dashboard?

This dashboard is not tailored for any specific user group and can be used by anyone who has access. This dashboard may be very helpful for users who typically trend spending against budget or look at forecasting and projection data for multiple fiscal years. Any user who looks at Budget Summary or Budget Detail information may find this dashboard helpful though and can gain access by completing the e-Learning training module.

Use Notes

There are a number of dashboard prompts on each page, which are intended to give users multiple options of querying the data. Users will need to be very conscious though of what is selected and how the report works. For instance, if a user does not select specific funds, it will aggregate ALL funds together, including YTD and ITD funds. This concept is true throughout the dashboard and applies to other chartfields and dimensions such as Fiscal Year, Orgs, Projects, Programs and Accounts.