



# DASHBOARD CROSSWALK

Introduction to Two New Analytics Budget Dashboards

The Office of Budget & Planning  
University of Arizona

Old version

Dashboards ▾ New ▾ Open ▾

Most Recent(General - Financial Manager)

My Dashboard

▶ All Dashboards Index

▲ Budget

- ☰ All Funds Multi-Year
- ☰ Budget - Current
- ☰ ERE
- ☰ Local Fund Budget
- ☰ Operating Budget Book - Current

▶ Employee

▶ Financial

▶ Learning

▶ RCM

▶ Security

▶ Student

▶ TCE

▶ Toolkit

▶ UA Departments

▶ UAccess Analytics

▶ UAccess Warehouse

New version

Dashboards ▾ New ▾ Open ▾

Most Recent(General - Financial Manager)

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▶ All Dashboards Index

▲ Budget

- ☰ New - Line Management
- ☰ New - Operating Budgets & Multi-Year Plans

▶ Employee

▶ Financial

▶ Learning

▶ RCM

▶ Security

▶ Student

▶ TCE

▶ Toolkit

▶ UA Departments

▶ UAccess Analytics

▶ UAccess Warehouse

Two new budget dashboards have been created to replace five old dashboards...

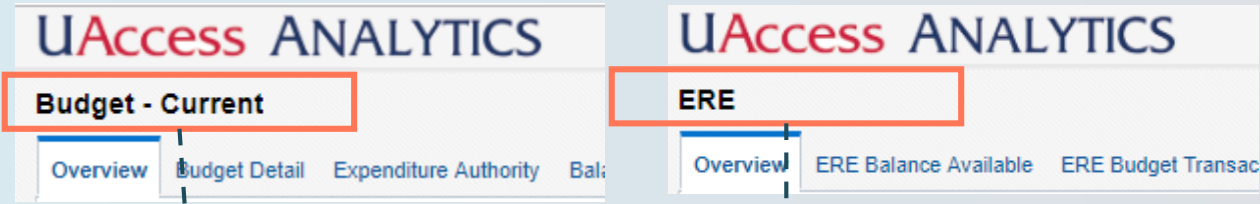


# Dashboard No. 1: Line Management

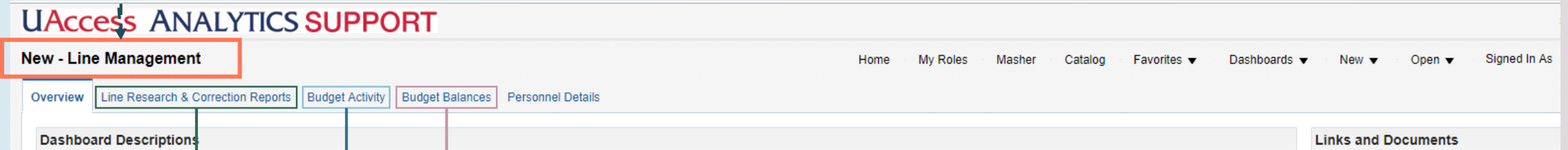
New dashboard **Line Management** encompasses many of the reports that could previously be found in dashboards **Budget – Current & ERE**

The screenshot shows the 'UAccess ANALYTICS SUPPORT' interface. The main title is 'New - Line Management'. The navigation bar includes 'Home', 'My Roles', 'Masher', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As'. Below the navigation bar, there are tabs for 'Overview', 'Line Research & Correction Reports', 'Budget Activity', 'Budget Balances', and 'Personnel Details'. The 'Overview' tab is active. The main content area is titled 'Dashboard Descriptions' and contains a paragraph: 'UAIR and OBP have worked together to group and consolidate reports from the Budget-Current and ERE dashboards onto this new dashboard designed to support your management of Budget Lines. This dashboard is organized to assist in pointing out deficits and surpluses in Lines and providing reports to help you quickly adjust Line balances (Auto-RBC) or research what has caused surplus or deficit to occur.' To the right of the main content area is a 'Links and Documents' sidebar with the following items: 'Office of Budget and Planning Site', 'Budget/RBC system', 'All Funds Multi-Year with Metrics - Previous Version', 'Current Year', and 'All Funds Multi-Year with Sponsored Split'. The bottom right corner of the page features a stylized 'A' logo.

# Line Management



New view



## Line Research & Correction Reports:

1. Budget Line Management Report
2. Auto RBC

## Budget Activity Reports:

1. Budget Transaction
2. Budget Activity Download

## Budget Balances Reports:

1. Current & Next Year Budget
2. Expenditure Authority
3. Cash Expenditure Authority
4. Employee All Funds Expenditure Authority
5. Dept. Account Summary



## Dashboard No. 2:

# Operating Budgets & Multi-Year Plans

New dashboard **Operating Budgets & Multi-Year Plans** encompasses many of the reports that could previously be found in dashboard **All Funds Multi-Year & Local Fund Budgets**

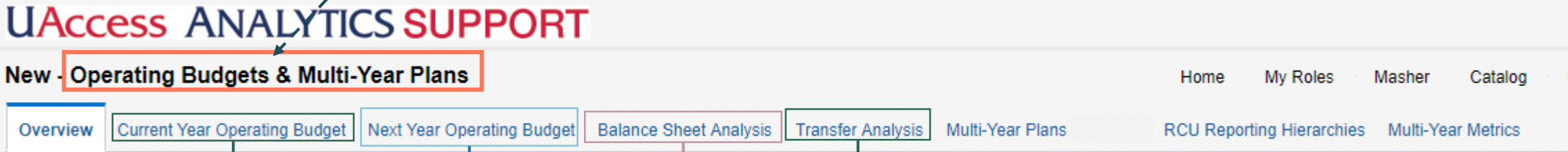
The screenshot shows the UAccess Analytics Support interface. At the top, the header reads "UAccess ANALYTICS SUPPORT" with a "Sign Out" link on the right. Below the header is a navigation bar with the title "New - Operating Budgets & Multi-Year Plans" and several menu items: Home, My Roles, Masher, Catalog, Favorites, Dashboards, and New. A secondary navigation bar contains tabs for "Overview", "Current Year Operating Budget", "Next Year Operating Budget", "Balance Sheet Analysis", "Transfer Analysis", and "Multi-Year Plans & Metric". The main content area is divided into two columns. The left column, titled "Dashboard Descriptions", contains a paragraph explaining that UAIR and OBP have consolidated reports from various dashboards into this new one to support departmental budget management and analysis. The right column, titled "Links and Documents", lists several resources including the "Office of Budget and Planning Site", the "Budget/RBC system", and various reports like "All Funds Multi-Year with Metrics - Previous Version Current Year" and "All Funds Multi-Year with Sponsored Split Summary Object Code Roll Up".



# Operating Budgets & Multi-Year Plans



New View



**Current Year Operating Budget:**

1. Operating Budget vs. Actuals
2. Operating Budget 4-year Trend & YTD Analysis

**Next Year Operating Budget:**

1. Next Year Proposed Operating Budget
2. Next Year Proposed Budgeted Transfers

**Balance Sheet Analysis:**

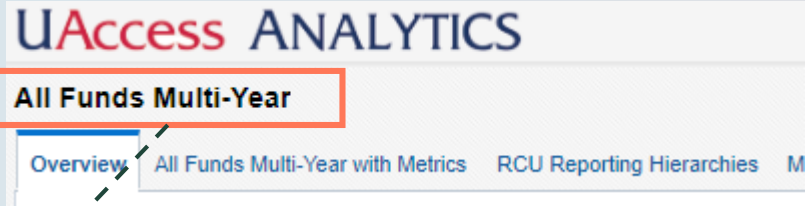
1. Fund Balance Components
2. Fund Balance Analysis

**Transfer Analysis:**

1. Budget vs Actuals Current Year
2. Transfer Detail



# Operating Budgets & Multi-Year Plans



New View

## UAccess ANALYTICS SUPPORT

### New - Operating Budgets & Multi-Year Plans

Home My Roles Masher Catalog

Overview Current Year Operating Budget Next Year Operating Budget Balance Sheet Analysis Transfer Analysis Multi-Year Plans RCU Reporting Hierarchies Multi-Year Metrics

#### Multi-Year Plans:

1. All Funds Multi-Year with Metrics

#### RCU Reporting Hierarchies:

1. Organization Codes for an RCU Name
2. RCU Names for an Organization Code

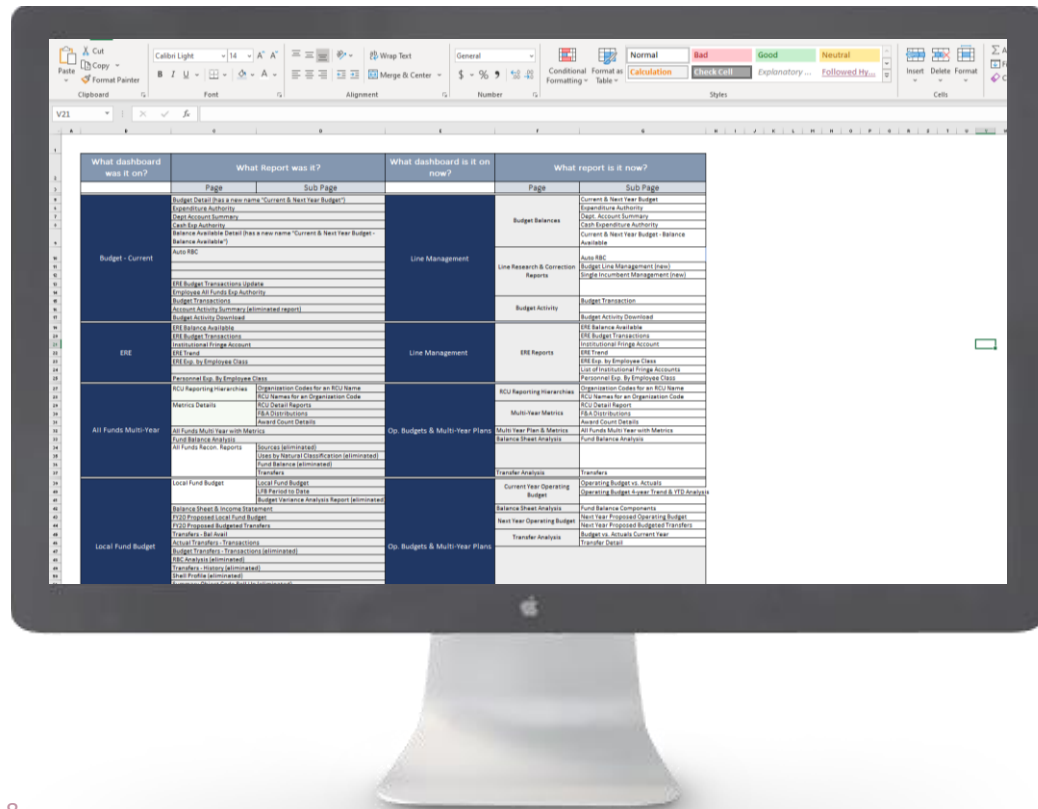
#### Multi-Year Metrics

1. RCU Detail Report
2. F&A Distributions
3. Award Count Details



# In the next slide...

you will find a crosswalk spreadsheet which outlines:



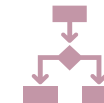
The *old* Dashboard name



The *old* Report name



The *new* Dashboard which corresponds with the *old* Dashboard



The *new* Report name





# CROSS- WALK



What dashboard was it on?	What Report was it?		What dashboard is it on now?	What report is it now?	
	Page	Sub Page		Page	Sub Page
Budget - Current	Budget Detail (has a new name "Current & Next Year Budget")		Line Management	Budget Balances	Current & Next Year Budget
	Expenditure Authority				Expenditure Authority
	Dept Account Summary				Dept. Account Summary
	Cash Exp Authority				Cash Expenditure Authority
	Balance Available Detail (has a new name "Current & Next Year Budget - Balance Available")				Current & Next Year Budget - Balance Available
	Auto RBC			Auto RBC	
	Account Activity Summary (eliminated report)			Budget Line Management (new)	
				Single Incumbent Management (new)	
	Employee All Funds Exp Authority			Employee All Funds Exp Authority	
	Budget Transaction			Budget Transaction	
Budget Activity Download		Budget Activity Download			
ERE	ERE Balance Available		Line Management	ERE Reports	ERE Balance Available
	ERE Budget Transactions				ERE Budget Account
	Institutional Fringe Account				Institutional Fringe Account
	ERE Trend				ERE Trend
	ERE Exp. by Employee Class				ERE Exp. by Employee Class
	Personnel Exp. By Employee Class				List of Institutional Fringe Accounts
				Personnel Exp. By Employee Class	
RCU Reporting Hierarchie		Organization Codes for an RCU Name	Op. Budgets & Multi-Year Plans	RCU Reporting Hierarchies	Organization Codes for an RCU Name
Metrics Details		RCU Names for an Organization Code			Multi-Year Metrics
		RCU Detail Reports		RCU Detail Report	
		F&A Distributions		F&A Distributions	
All Funds Multi Year with Metrics		Award Count Details		Award Count Details	
Fund Balance Analysis				Multi Year Plans	All Funds Multi Year with Metrics
				Balance Sheet Analysis	Fund Balance Analysis
All Funds Recon. Reports		Sources (eliminated)			
		Uses by Natural Classification (eliminated)			
		Fund Balance (eliminated)			
		Transfers	Transfer Analysis	Transfer Detail	
Local Fund Budget	Local Fund Budget		Op. Budgets & Multi-Year Plans	Current Year Operating Budget	Operating Budget vs. Actuals
					Operating Budget 4-year Trend & YTD Analysis
	Balance Sheet & Income Statement			Balance Sheet Analysis	Fund Balance Components
	FY20 Proposed Local Fund Budget			Next Year Operating Budget	Next Year Proposed Operating Budget
	FY20 Proposed Budgeted Transfers				Next Year Proposed Budgeted Transfers
	Transfers - Bal Avail			Transfer Analysis	Budget vs. Actuals Current Year
	Actual Transfers - Transactions (eliminated)				
	Budget Transfers - Transactions (eliminated)				
	RBC Analysis (eliminated)				
	Transfers - History (eliminated)				
	Shell Profile (eliminated)				
	Summary Object Code Roll Up (eliminated)				
	Shell Status (eliminated)				
	LFB Budget Load Reconciliation (eliminated)				
	Proposed LFB Reconciliation (eliminated)				
Operating Budget Book - Current	Annual Book Budget		Line Management	Personnel Details	Personnel Operating Budget Book Format



# Line Management

Dashboard	Reports	
Line Management	Page	Sub Page
<p>Description: UAIR and OBP have worked together to group and consolidate reports from the Budget-Current and ERE dashboards onto this new dashboard designed to support your management of Budget Lines. This dashboard is organized to assist in pointing out deficits and surpluses in Lines and providing reports to help you quickly adjust Line balances (Auto-RBC) or research what has caused surplus or deficit to occur.</p>	Line Research & Correction Reports	Budget Line Management
		Single Incumbent Management
		Auto RBC
	Budget Activity	Budget Transaction
		Budget Activity Download
	Budget Balances	Current & Next Year Budget
		Current & Next Year Budget - Balance Available
		Expenditure Authority
		Cash Expenditure Authority
		Departmental Account Summary
	Personnel Details	Personnel Expenditures by Employee Class
		Personnel Operating Budget Book Format
		Employee All Funds Expenditure Authority
	ERE Reports	ERE Budget Account
		ERE Balance Available
		ERE Expenditure by Employee Class
		ERE Trend
Institutional Fringe Account		
List of Institutional Fringe Accounts		



# Operating Budgets & Multi-Year Plans

Dashboard	Reports	
<b>Operating Budgets &amp; Multi-Year Plans</b>	Page	Sub Page
	Current Year Operating Budget	Operating Budget vs. Actuals Operating Budget 4-year Trend & YTD Analysis
Description: UAIR and OBP have worked together to group and consolidate reports from the Budget-Current, All-Funds Multi-Year, and Local Funds Budget dashboards onto this new dashboard designed to support your management of departmental operating budgets and the creation of new year budgets and multi-year financial plans. This dashboard is organized to assist you in analyzing budget deficits and surpluses in accounts, shells, and organizations as well as provide analysis of your historical actuals for preparation of your annual budgets and multi-year plans.	Next Year Operating Budget	Next Year Proposed Operating Budget Next Year Proposed Budgeted Transfers Operating Budget Variance
	Balance Sheet Analysis	Fund Balance Components Fund Balance Analysis
	Transfer Analysis	Budget vs. Actuals Current Year Transfer Detail
	Multi-Year Plans	All Funds Multi-Year with Metrics
	RCU Reporting Hierarchies	Organization Codes for an RCU Name
		RCU Names for an Organization Code
	Multi-Year Metrics	RCU Detail Report
		F&A Distributions
		Award Count Details



 **Thank you!**

Please contact [The Office of Budget and Planning](#) for more information.