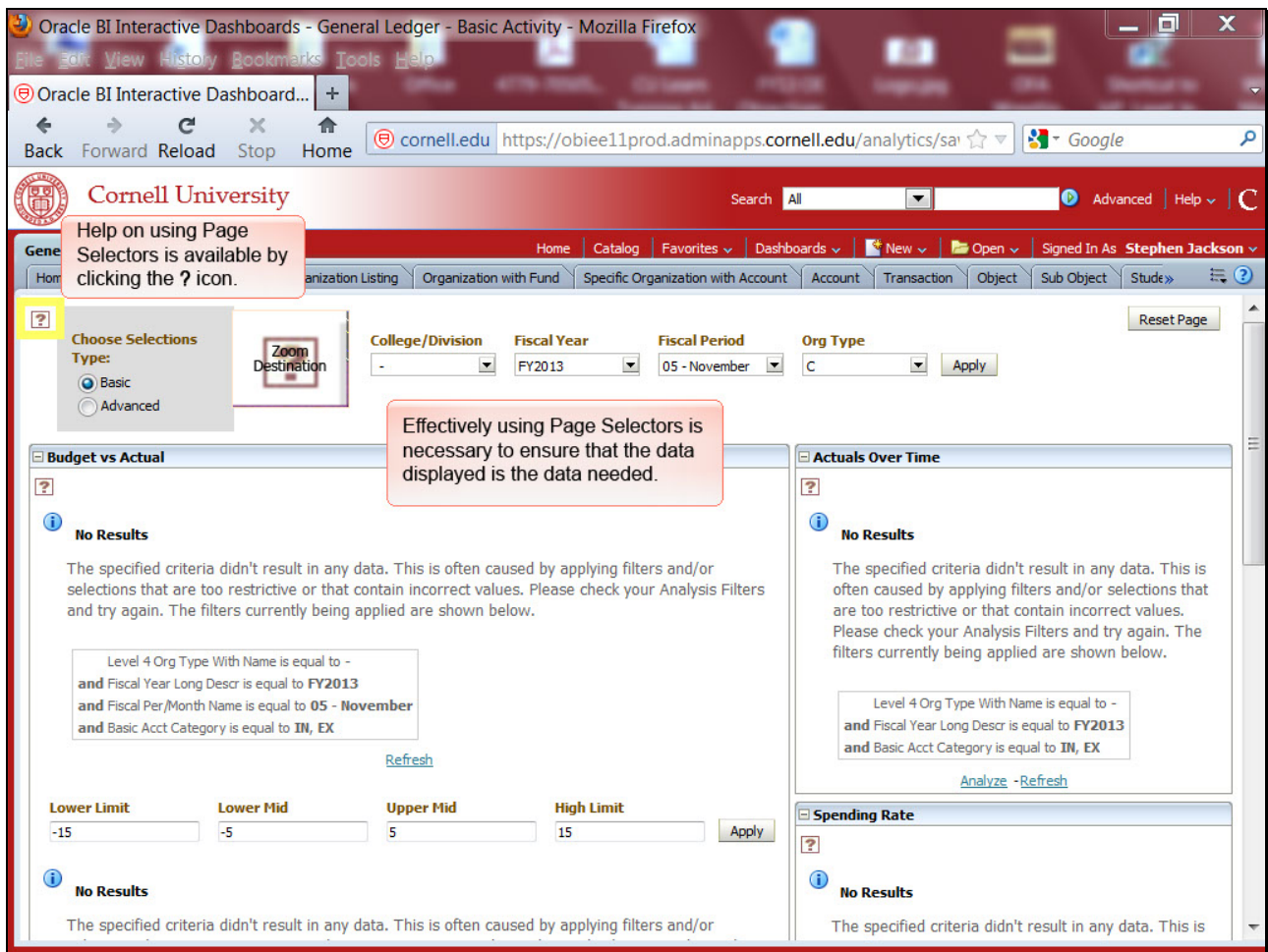


Chapter 3: Using Dashboard Help



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.

The screenshot shows a web browser window with the URL `https://obiee11prod.adminapps.cornell.edu/analytics/sa`. The page title is "General Ledger - Basic Activity". The navigation bar includes "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", "Signed In As Stephen Jackson", and "Help". The main content area has a breadcrumb trail: "Home", "Organization Summary", "Organization Listing", "Organization with Fund", "Specific Organization with Account", "Account", "Transaction", "Object", "Sub Object", "Student".

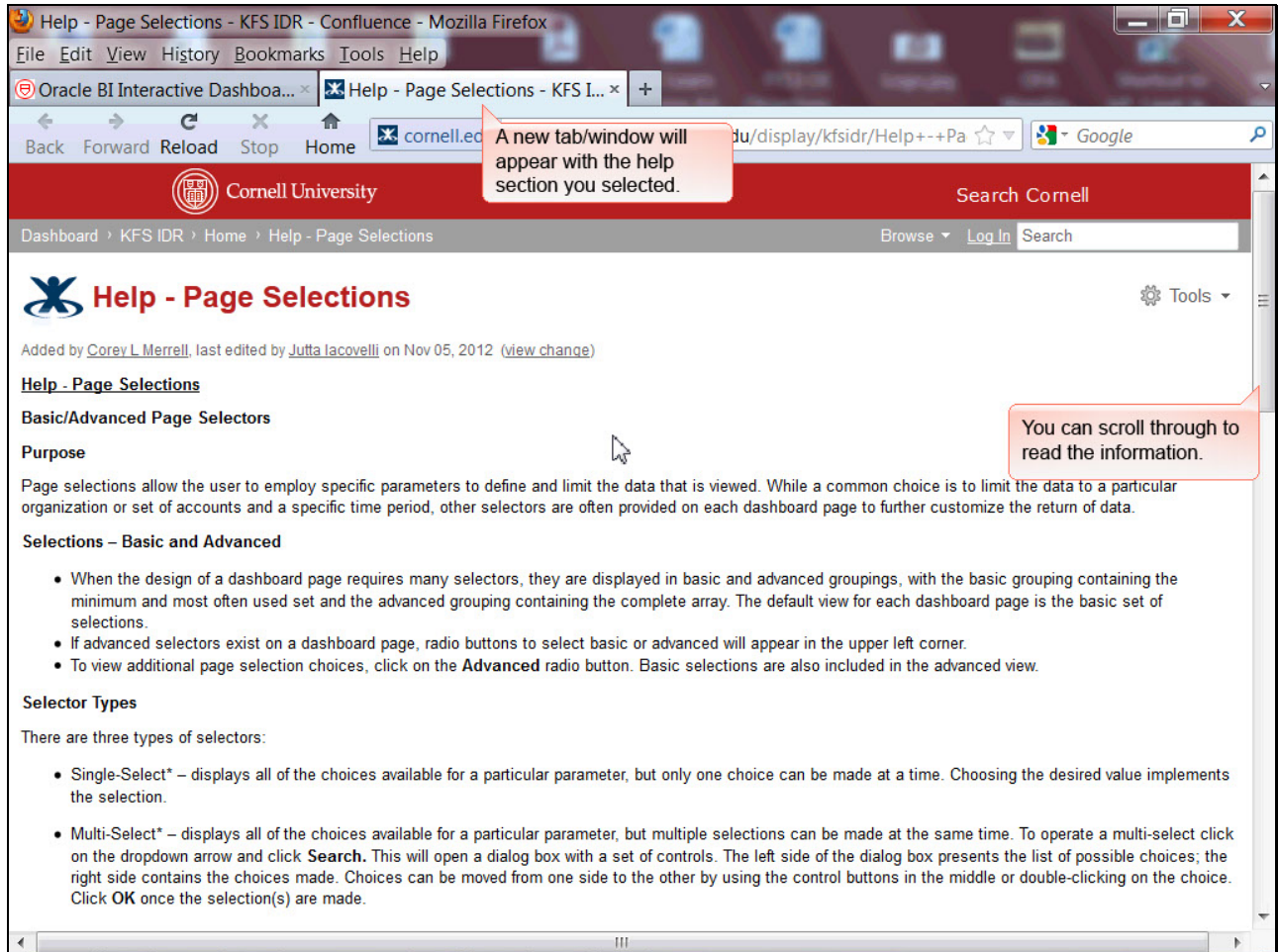
At the top, there are filters for "College/Division" (set to "-"), "Fiscal Year" (set to "FY2013"), "Fiscal Period" (set to "05 - November"), and "Org Type" (set to "C"). An "Apply" button is next to these filters. A "Reset Page" button is also present.

A red callout box with a white background and a red border points to a question mark icon in the top left of the "Choose Selections" area. The text inside the box says "Select the question mark button." Below this, there are three panels, each displaying a "No Results" message:

- Budget vs Actual:** "No Results. The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below." Below this is a box listing filters: "Level 4 Org Type With Name is equal to - and Fiscal Year Long Descr is equal to FY2013 and Fiscal Per/Month Name is equal to 05 - November and Basic Acct Category is equal to IN, EX". A "Refresh" link is below the box. At the bottom, there are input fields for "Lower Limit" (-15), "Lower Mid" (-5), "Upper Mid" (5), and "High Limit" (15), with an "Apply" button.
- Actuals Over Time:** "No Results. The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below." Below this is a box listing filters: "Level 4 Org Type With Name is equal to - and Fiscal Year Long Descr is equal to FY2013 and Basic Acct Category is equal to IN, EX". An "Analyze - Refresh" link is below the box.
- Spending Rate:** "No Results. The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below."

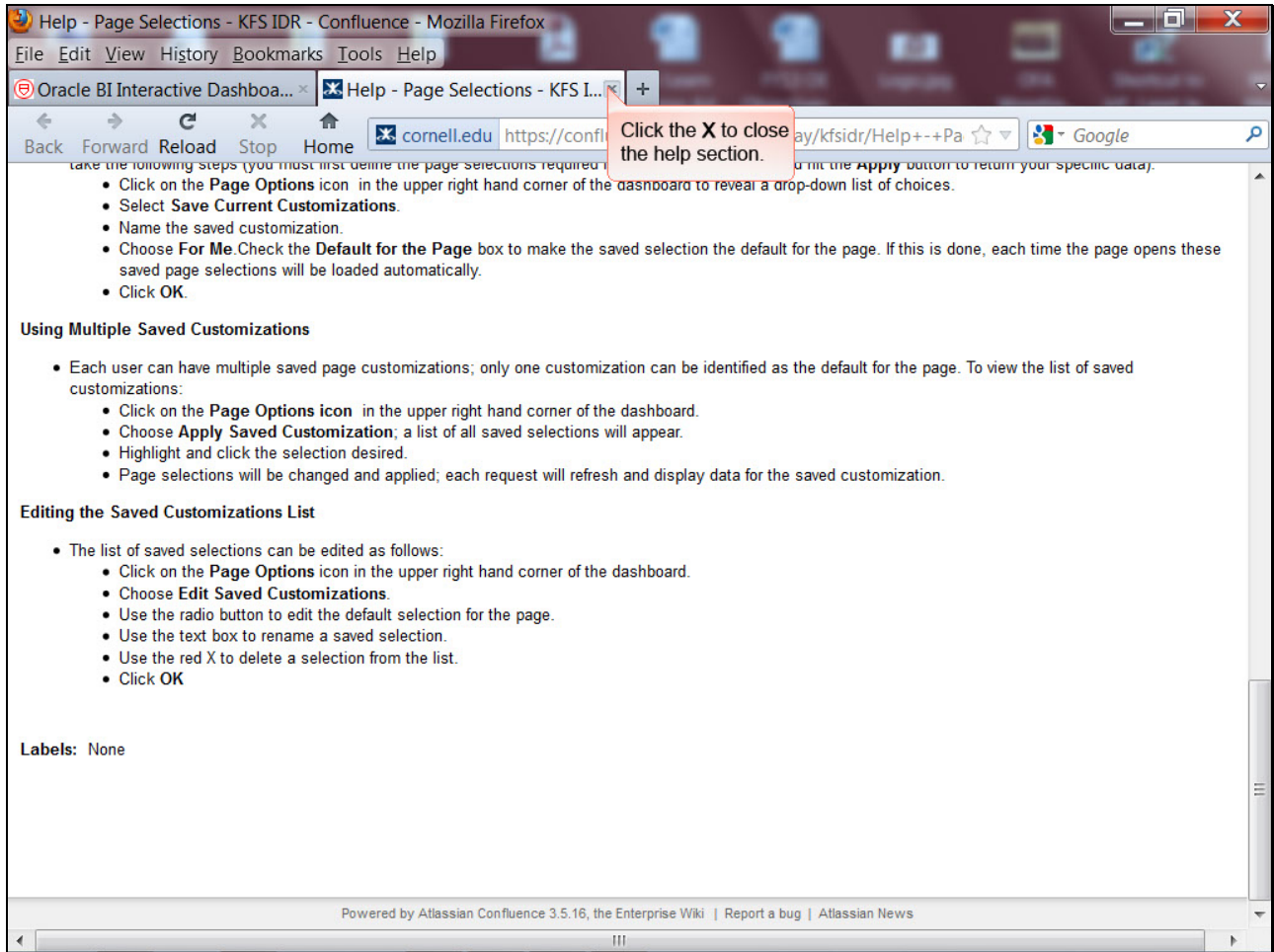
At the bottom left of the screenshot, there is a small text box containing the code `javascript:void(null)`.

Select the **question mark** button.



A new tab/window will appear with the help section you selected.

You can scroll through to read the information.



Click the X to close the help section.

The screenshot shows a web browser window with the following details:

- Browser:** Mozilla Firefox, Oracle BI Interactive Dashboards - General Ledger - Basic Activity
- Address Bar:** <https://obiee11prod.adminapps.cornell.edu/analytcs/sa>
- Page Header:** Cornell University, Search: All, Advanced, Help
- Navigation:** Home, Catalog, Favorites, Dashboards, New, Open, Signed In As: Stephen Jackson
- Filters:** College/Division: -, Fiscal Year: FY2013, Fiscal Period: 05 - November, Org Type: C
- Sections:** Budget vs Actual, Actuals Over Time, Spending Rate
- Results:** All sections show "No Results" with a message: "The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below."
- Filters Applied:** Level 4 Org Type With Name is equal to -, and Fiscal Year Long Descr is equal to FY2013, and Fiscal Per/Month Name is equal to 05 - November, and Basic Acct Category is equal to IN, EX
- Callout Box:** A red box with a question mark icon and text: "Help specific to each section is also available by clicking the ? icon in that section."

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

Help - Budget vs Actual - KFS IDR - Confluence - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Oracle BI Interactive Dashboa... x Help - Budget vs Actual - KFS... x +

Back Forward Reload Stop Home [cornell.edu](http://cornell.edu) <https://confluence.cornell.edu/display/kfsidr/Help+-+Bu> ☆ Google

Cornell University Search Cornell

Dashboard > KFS IDR > ... > Dashboard - General Ledger Basic Activity > Help - Budget vs Actual Browse Log In Search

## Help - Budget vs Actual

Added by [Rayna J King](#), last edited by [Jutta Iacovelli](#) on Nov 07, 2012 ([view change](#))

**Purpose**

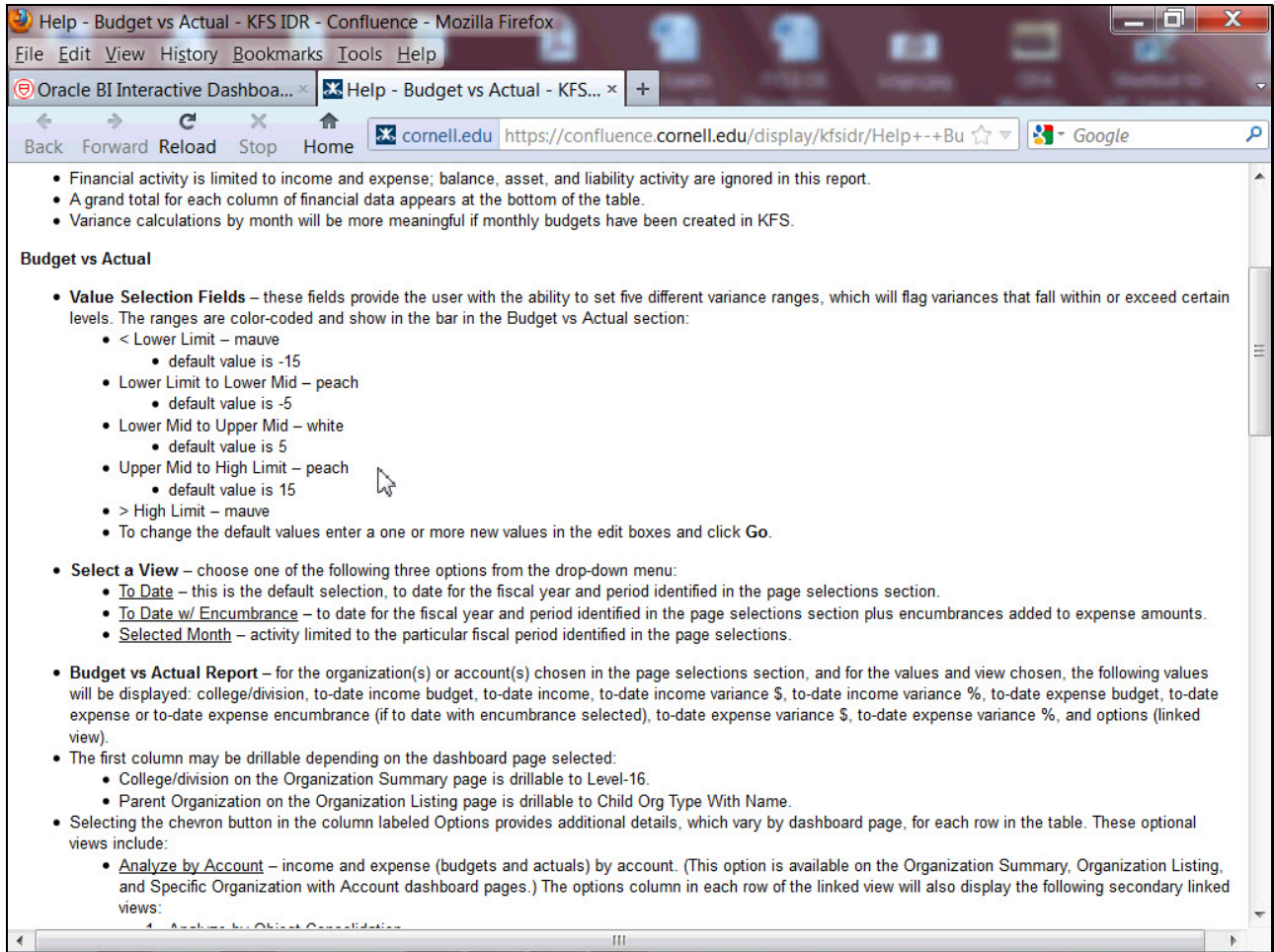
This report compares budgets to actual income and expenses on a monthly, to-date, or to-date-with-encumbrance basis, calculating dollar and percent variances to the amounts budgeted.

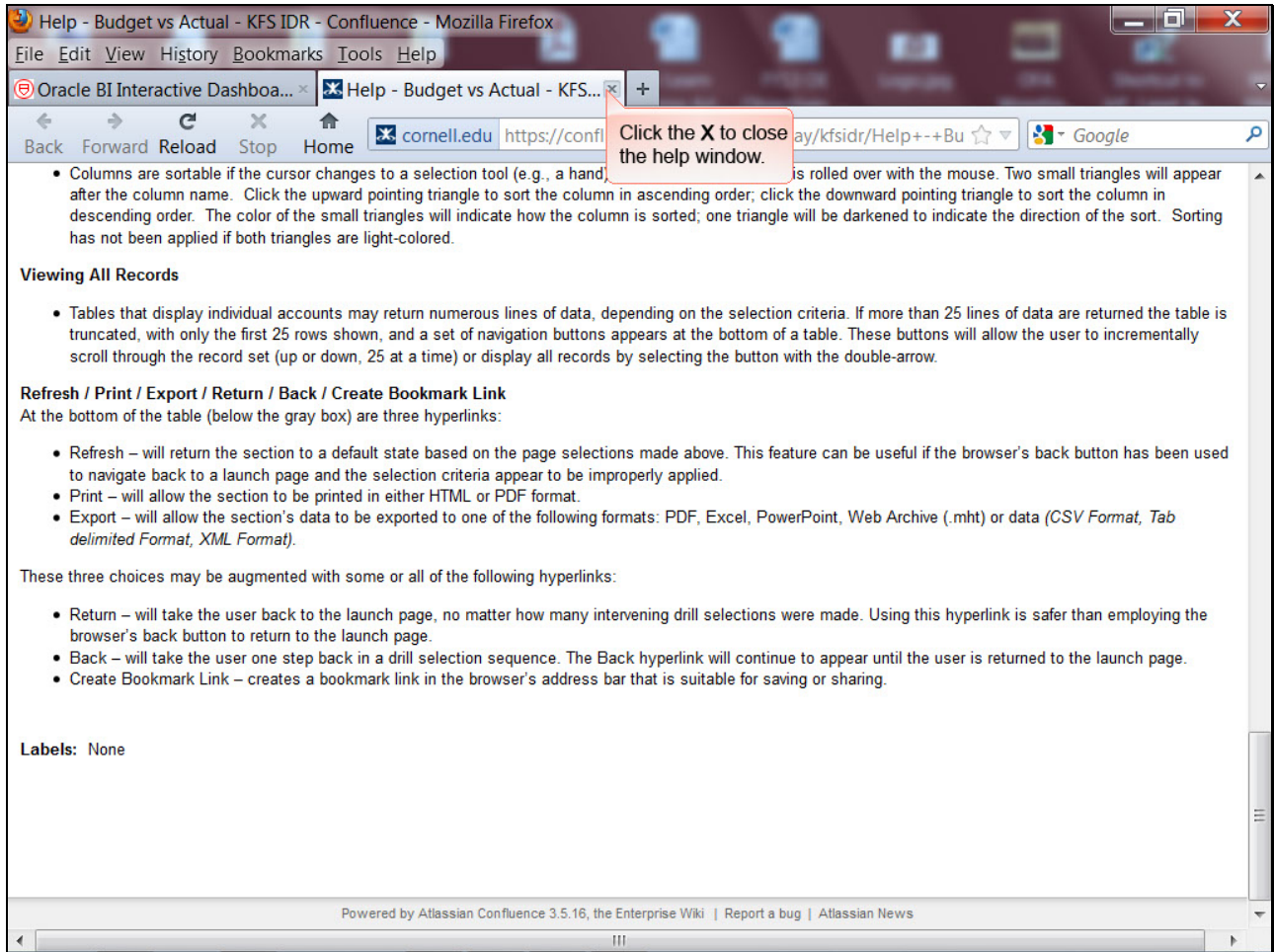
**General Notes**

- 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 fall within or exceed certain 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
  - > 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:
  - To Date – this is the default selection to date for the fiscal year and period identified in the page selections section





Click the **X** to close the help window.



The screenshot shows a web browser window with the following details:

- Browser:** Mozilla Firefox
- Address Bar:** <https://obiee11prod.adminapps.cornell.edu/analytcs/sa/>
- Page Title:** Oracle BI Interactive Dashboards - General Ledger - Basic Activity
- Navigation:** Home, Catalog, Favorites, Dashboards, New, Open, Signed In As Stephen Jackson
- Filters:** College/Division: -, Fiscal Year: FY2013, Fiscal Period: 05 - November, Org Type: C
- Sections:**
  - Budget vs Actual:** No Results. The specified criteria didn't result in any data. The filters currently being applied are: Level 4 Org Type With Name is equal to -, and Fiscal Year Long Descr is equal to FY2013, and Fiscal Per/Month Name is equal to 05 - November, and Basic Acct Category is equal to IN, EX.
  - Actuals Over Time:** No Results. The specified criteria didn't result in any data. The filters currently being applied are: Level 4 Org Type With Name is equal to -, and Fiscal Year Long Descr is equal to FY2013, and Basic Acct Category is equal to IN, EX.
  - Spending Rate:** No Results. The specified criteria didn't result in any data.
- Input Fields:** Lower Limit: -15, Lower Mid: -5, Upper Mid: 5, High Limit: 15

Back on the dashboard page.