UVAFinance Finance Strategic Transformation

Fiscal Admin Dashboard Overview

This Quick Reference Guide (QRG) is designed to walk **Fiscal Admin roles** (e.g., Cost Center Manager, Preparer & Approver for Account Certification, P2P Roles - Requisitioner & Approver and Payroll Costing Manager & Specialist) through navigating the Fiscal Admin Dashboard. The **Fiscal Admin Dashboard** provides a one-stop shop for users in Fiscal Administrator or Operational Support Roles to access common tasks, reports, and other resources needed to perform their daily work. By the end of this QRG, you will be able to successfully access, set up, and review the Fiscal Admin Dashboard.
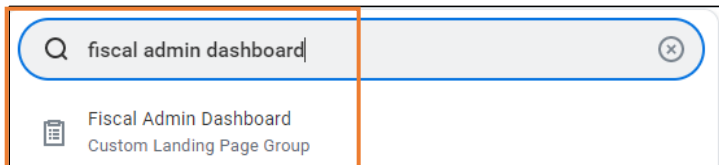
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Access the Fiscal Admin Dashboard

You can access the Fiscal Admin Dashboard in two ways: by searching directly in Workday or by selecting the Fiscal Admin Dashboard Worklet.

Access Fiscal Admin Dashboard from Workday Search:

On the **Workday Home** screen:

1. Type **Fiscal Admin Dashboard** and select the task.

Access Fiscal Admin Dashboard from Workday Applications:

On the **Workday Home** screen:

1. Select the **Configure Applications** gear icon, which is located next to the **Welcome, Your Name** banner.

On the **Configure Worklets** screen, under Optional Worklets:

2. To add a **Worklet**, click the **+** icon.
3. Type **Fiscal Admin Dashboard** in the Worklet field and select the task.
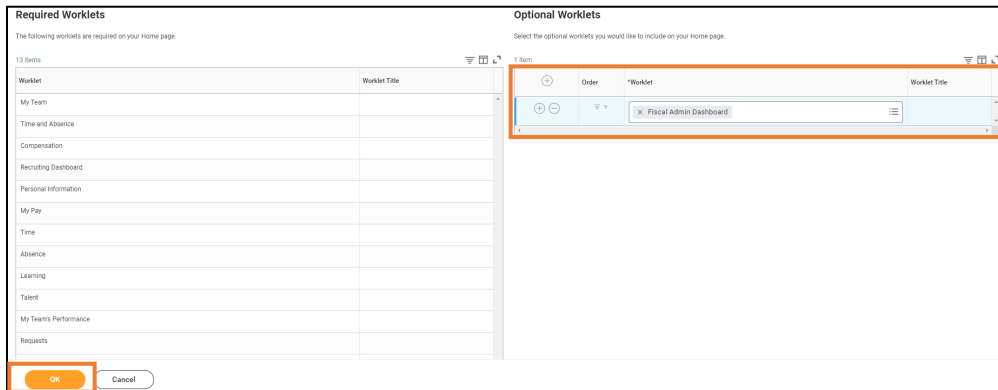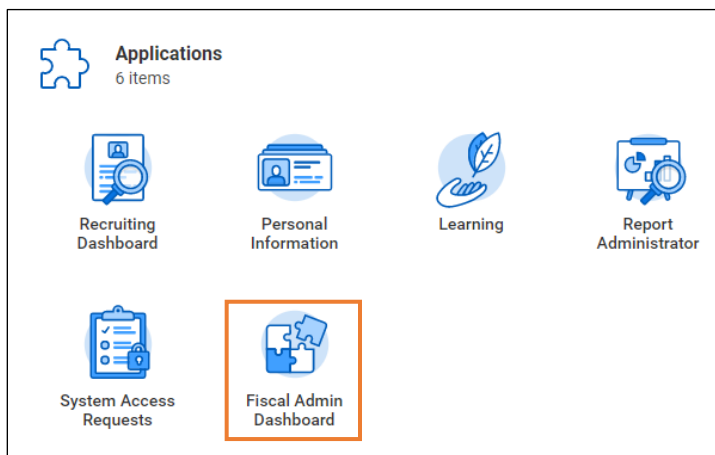
4. Click the **OK** button.

On the **Configure Worklets** screen:

5. Click the **Done** button. The worklet will now display under Applications on your **Workday Home** screen.

On the **Workday Home** screen:

6. Select the recently added Worklet to navigate to the Fiscal Admin Dashboard.

| NOTE | For quick access, you can save the **Fiscal Admin Dashboard Landing Page** to your Favorites in your browser settings. |

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Set Up and Modify Fiscal Admin Dashboard

When visiting the Fiscal Admin Dashboard for the first time, **you will need to set up each section once in order for the data to display for future visits.** You can set up and modify these sections by using available functionalities (Configure and View Chart Data). You may have one or both options available at the top right corner of each section.

The table below provides a summary of the functionalities available in the Fiscal Admin Dashboard. Each functionality is displayed in the form of icons when viewing a section in Workday.

Icon	Name	Description
	Configure and View Chart Data	**View Chart Data** allows you to select various chart types to view your data. For example, Donut, Line, Stacked Column, etc. **Configure** allows you to modify your variables on the X and Y Axis and the metrics to be included.
	Edit Settings	The **Edit Settings** option allows you to filter the data and view only relevant data using worktags. Once you have made your selections, click **OK** in the **Edit Worklet Settings** to save changes. You will most commonly filter by your **Cost Center/Cost Center Hierarchy**. You can download and export the report using **Download in Excel** and **Export to Worksheets** option respectively.

> It is important to set-up your preferences early on as this will automatically save for future visits to the Dashboard.

Modify Section - Edit Settings as follows:

1. On the **Fiscal Admin Dashboard**, navigate to the section you would like to edit settings and configure.
2. Click the **Edit Settings** icon.
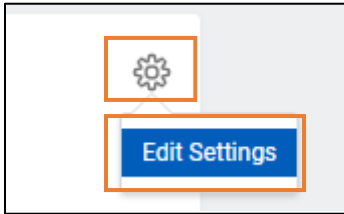
3. On the **Edit Worklet Settings** screen, enter the information required for each field to customize this section. You can also enter information in the optional fields to narrow your search results.

|	For Edit Worklet Settings, there may be different fields you can fill out for each section. **You most likely will always filter by your Cost Center/Cost Center Hierarchy.** • In the Cost Center or Worktags field, enter your cost center. You can also select the Cost Centers by Cost Center Hierarchy if needed.

4. Click the **OK** button to save your changes. You will now see the sections displayed based on your defined preferences.

Modify Section - Configure and View Chart Data as follows:

1. On the **Fiscal Admin Dashboard**, navigate to the section you would like **Configure and View Chart Data.**
2. Click the **Configure and View Chart Data** icon.
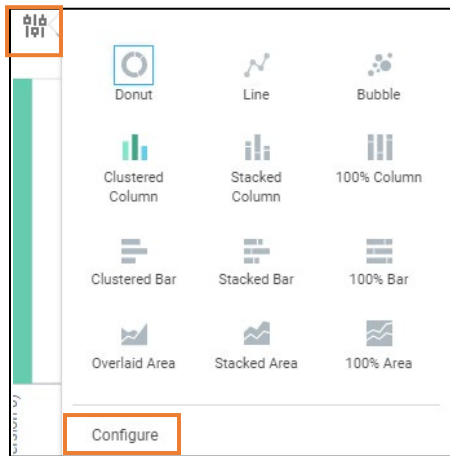
If you do not see the **Configure and View Chart Data** icon, click the **Edit Settings** icon and select **Show Chart**. This will now display the icon.

3. Select the **chart type** you want (e.g. Donut, Line, Stacked Bar, etc.).
4. For advanced settings, select **Configure.**
5. In the **Configure** window, modify the variables section as needed such as the Horizontal Axis and Legend.
6. Select the **arrow (>)** icon next to **Advanced** to expand the section and modify as needed.
7. Select (**x**) icon to close out the window. Your changes will now be displayed and saved.

Review Fiscal Admin Dashboard

On the **Fiscal Admin Dashboard** screen:

1. Select the following tabs:
   - **Landing Page** – This page displays sections such as Processes Awaiting Action, YTD Expenses by Cost Center, and Fiscal Admin Spotlight Report in the form of a chart and table.
   - **Purchasing/Spend** – This tab displays sections such as OTPS Spend Summary in the form of a chart and table. It also lists tasks, reports and quick links related to Purchasing/Spend.
   - **Finances** – This tab displays sections such as YTD Revenue and YTD Fund Balance in the form of a chart and table. It also lists tasks, reports, and quick links related to Finances.

- **Payroll Costing** – This tab displays sections such as YTD Personnel Expense in the form of a chart and table. It also lists tasks, reports, and quick links related to Payroll Costing.
- **Workforce** – This tab displays sections such as Workforce Facts by Cost Center and Job Category in the form of a chart and table. It also lists tasks, reports, and quick links related to Workforce.

> **NOTE**
> When reviewing each tab, certain data may not be displayed. This requires you to configure and edit the specific sections to match your viewing preferences. Refer to **Modify Fiscal Admin Dashboard** to set your data viewing preferences.

Under the **Landing Page** tab:

2. Review the following sections:
   - **Processes Awaiting Action** – You can access the listed business processes that are awaiting action. Hover your mouse over the specific area for further details and select the data point to take action on.
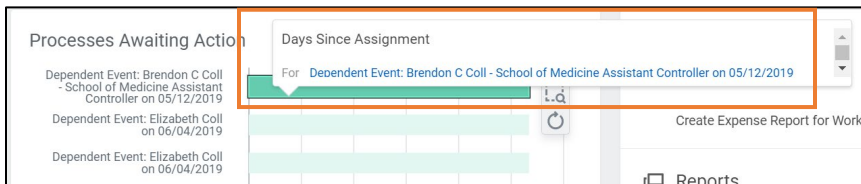
   - **YTD Expenses by Cost Center** – You can view the total sum of Ledger/Budget Debit minus Credit for **YTD Expenses by Cost Center.** Hover your mouse over an area or select a data point for further details.
   - **Fiscal Admin Spotlight Report** – You can access a list of **Fiscal Admin Spotlight Reports** you can view. Spotlight reports provide a list of custom and standard reports that support different functions. This is a one stop shop to view all reports related to one area. Select the report you would like to run from this section.
   - **Reports** - You can access common reports such as **FDM Reference Spotlight Reports, FDM Reference – Cost Center, and FDM Reference – Funds.** Select the report you would like to run from this section.
   - **Quick Links** – You can access quick links such as **UVA Finance, UBI User Hub**, and **UVA Finance Business Terms**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

> **NOTE**
> Instead of selecting the hyperlink directly, **right click** and select **See in New Tab.** This will open the hyperlink in a brand-new tab that avoids having to navigate back to the Fiscal Admin Dashboard.

Under the **OTPS Spend Summary** tab:

3. Review the following sections:
   - **OTPS Spend Summary** – You can view the total Sum of Ledger/Budget Debit minus Credit for OTPS Spend. Hover your mouse over an area or select a data point for further details.
   - **Tasks** - You can access common tasks such as **Create Expense Report**, **Create Expense Report for Worker**, and **Find Expense Reports.** Select the task you would like to initiate from this section.
   - **Reports** - You can access common reports such as **Find Suppliers Contact Info**, **Spend by Purchase Orders**, and **Customer Invoices in Progress.** Select the report you would like to run from this section.
   - **Quick Links** – You can access quick links such as **UVA Finance**, **UBI User Hub,** and **PaymentWorks Resources.** These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Finances** tab:

4. Review the following sections:
   - **YTD Revenue** – You can view the total Sum of Ledger/Budget Debit minus Credit for **YTD Revenue.** Hover your mouse over an area or select a data point for further details..
   - **YTD Fund Balance** – You can view details of the total Sum of Ledger/Budget Debit minus Credit for **YTD Fund Balance.** Hover your mouse over an area or select a data point for further details.
   - **Tasks** - You can access common tasks such as **Create Expense Report** and **Create Journal.** Select the task you would like to initiate from this section.
   - **Reports** - You can access common reports such as **Fund Balance by Fund**, **Budget and Actuals Summary Report**, **Budget vs Actual by Cost Center** and **Spend Detail Report.** Select the report you would like to run from this section.
   - **Quick Links** – You can access quick links such as **UBI User Hub.** These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Payroll Costing** tab:

5. Review the following sections:
   - **YTD Personnel Expense** – You can view the total Sum of Ledger/Budget Debit minus Credit for **YTD Personnel Expense.** Hover your mouse over an area or select a data point for further details.

- **Tasks** - You can access common tasks such as **Assign Costing Allocation** and **Create Payroll Accounting Adjustments**. Select the task you would like to initiate from this section.
- **Reports** - You can access common reports such as **FDM Reference Spotlight Reports**, **Labor Distribution Assignments (ACD)**, **Institutional Base Salary Details** and **Position Budget vs Actual**. Select the report you would like to run from this section.
- **Quick Links** – You can access quick links such as **Salary Cap Tool**, **UVA Payroll Calendars**, **UVA Holiday Calendars** and **Fringe Rates**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Workforce** tab:

6. Review the following sections:
   - **Workforce Facts by Cost Center and Job Category** – You can view details such as Position Count, Open Positions, Count of Distinct Workers, and FTE Sum. Hover your mouse over an area or select a data point for further details.
   - **Tasks** - You can access common tasks such as Create Job Requisition. Select the task you would like to initiate from this section.
   - **Reports** - You can access common reports such as Current Worker Detail Report, All Jobs and Positions by Organization and Job Requisition Workspace. Select the report you would like to run from this section.
   - **Quick Links** – You can access quick links such as **UBI User Hub**, **Hoo's Well** and **Academic Calendars**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

NOTE	Please note, certain sections, tasks, reports, and quick links may or may not be displayed or mentioned in this quick reference guide.